# **Inventor Self-Enrollment**

Quick Start Guide

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# Independent Inventor Self-Enrollment Quick Start Guide

This self-enrollment guide provides instructions for independent inventors (pro se) to self-enroll in Patent Center after using ID.me to verify their identity. Following self-enrollment, users will have full access to Patent Center as a registered user.

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### Introduction

The USPTO is introducing a new online process of verifying the identity of new patent filers, ID.me, which will be available in addition to mailing notarized paper forms. Using ID.me in coordination with the Patent Center self-enrollment process, will allow users to register in less than 30 minutes.

Users can still choose to postal mail the notarized <u>Patent Electronic Systems Verification</u> form to the <u>Patent Electronic Business Center</u>, which may take up to 10 <u>business days to complete</u>.



#### Step 1: Choosing your role

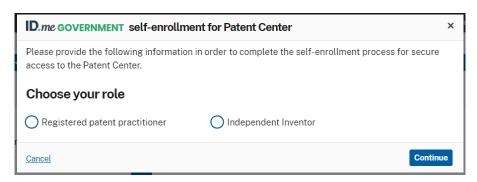
When new users log into Patent Center with a new USPTO.gov account verified with ID.me, they will see a pop-up window to begin the self-enrollment process. Please contact the <u>Patent Electronic Business Center</u> to assist you if the pop-up window does not appear after logging into Patent Center with new USPTO.gov account verified with ID.me.

After logging into Patent Center, the first step is for users to select their role when accessing the self-enrollment process in Patent Center. There are two roles to choose from, registered patent practitioner and independent (pro-se) inventor.

**Registered Patent Practitioner:** Select this role if you have passed the USPTO's registration exam and met the qualifications to represent patent applicants before the USPTO.

**Independent Inventor**: Select role if you choose to represent yourself while pursuing ("prosecuting") a patent application.

If Registered patent practitioner is selected, please use the <u>Registered patent practitioner quick</u> <u>start quide</u> (hyperlinked to the registered practitioner QSG) for assistance.



#### **Cancelling Self-enrollment**

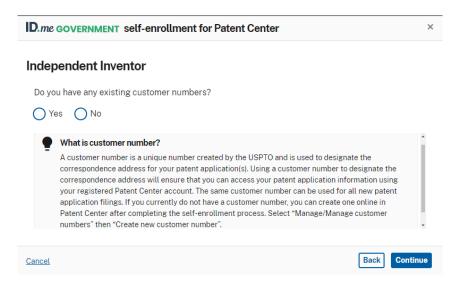
At any time, you can select "Cancel" to stop self-enrollment. To re-enter the self-enrollment process, click the "Complete self-enrollment" link in the upper right corner of the page. Once self-enrollment is complete, the "Complete self-enrollment" link will no longer be displayed.





#### **Step 2: Selecting customer numbers**

After selecting "Independent Inventor," the system will ask if you have any existing customer numbers.

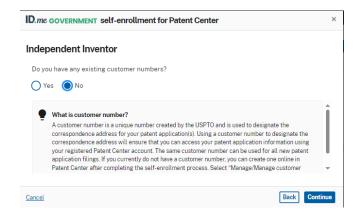


#### What is a Customer Number?

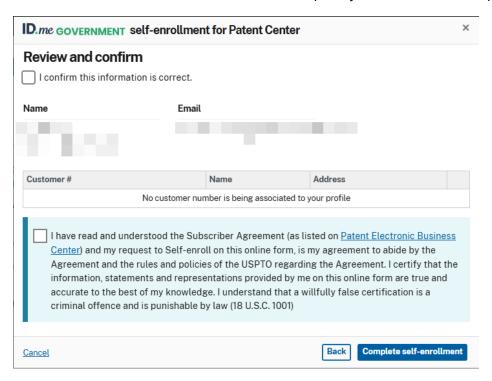
A customer number is a unique number created by the USPTO and is used to designate the correspondence address for your patent application(s). Using a customer number to designate the correspondence address will ensure that you can access your patent application information using your registered Patent Center account. The same customer number can be used for all new patent application filings.

#### What if I do not have any Customer Numbers

If you do not have any existing customer numbers to associate with your Independent Inventor account, select "No".

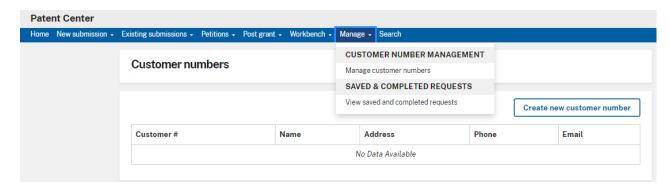


You will then be directed to the "Review and confirm" page to review your information before completing the self-enrollment process. If all the information is correct, check the "I confirm this information is correct" checkbox, and the subscriber agreement checkbox. You can then select the "Complete self-enrollment" button to submit and complete your self-enrollment process.



#### **Creating a new Customer Number in Patent Center**

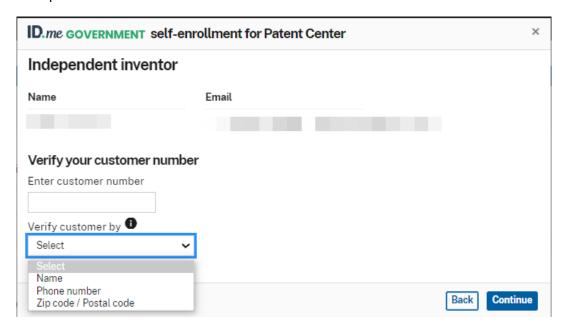
After completing the self-enrollment process, you can create customer numbers in Patent Center. Select "Manage," → "Manage customer numbers," and select "Create new customer number". Contact the <u>Patent Electronic Business Center</u> if you need assistance.



#### I have existing Customer Numbers

If you have customer numbers that you want associated to your Independent Inventor account, select "Yes" in the when asked, "Do you have any existing customer numbers?" You will be directed to input each customer number individually, and will need to verify each customer number by selecting one of the following options:

- Name: The name you assigned to the customer number
- Phone number: One of up to three phone numbers assigned to the customer number
- Zip code / Postal code: The zip code assigned to the customer number for U.S. addresses and postal code for international addresses.



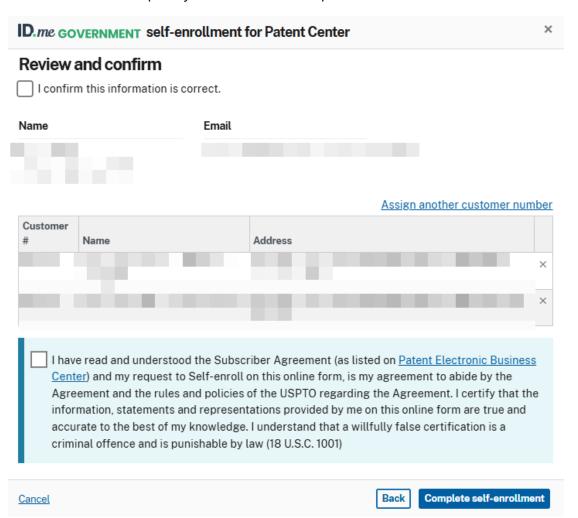
#### Why do I need to verify my Customer Number?

We want to ensure that the correct customer number is matched appropriately with your account.

#### Customer number and verification is accepted

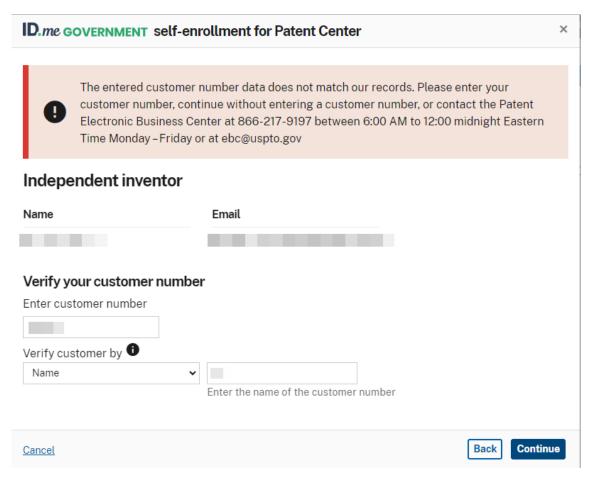
After successfully entering and verifying the customer number, you will be directed to the "Review and confirm" page. The customer number along with the name and address associated with the customer number will be displayed for your review. You can also add additional customer numbers by selecting the "Assign another customer number" link. You will repeat the steps for any additional customer numbers.

If any of the displayed information is incorrect, please contact the <u>Patent Electronic Business</u> <u>Center</u>. If the all information is correct, check the "I confirm this information is correct" checkbox, and the subscriber agreement checkbox. You can then select the "Complete self-enrollment" button to submit and complete your self-enrollment process.



#### Customer number and verification is not accepted

If the error message, "The entered customer number data does not match our records." is displayed, you can try again using the correct verification data, select a different verification option, or continue without entering a customer number. If you continue without entering a customer number, you can contact the <a href="Patent Electronic Business Center">Patent Electronic Business Center</a> for assistance to add your customer number to your USPTO.gov account.

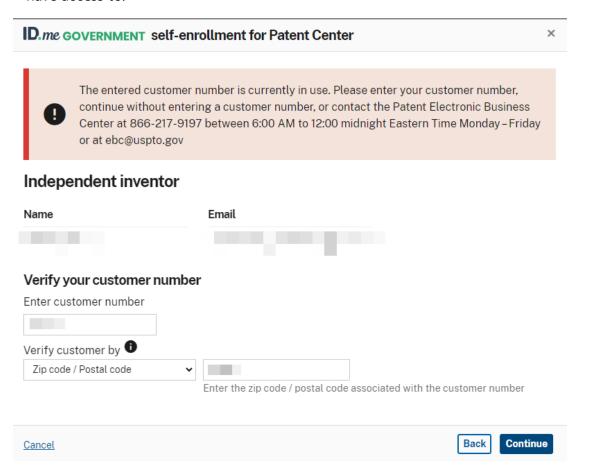


#### Customer number currently in use

If the error message, "The entered customer number is currently in use." is displayed, it means your customer number is currently linked to an active Patent Center account.

Possible scenarios that would cause this error message to display are:

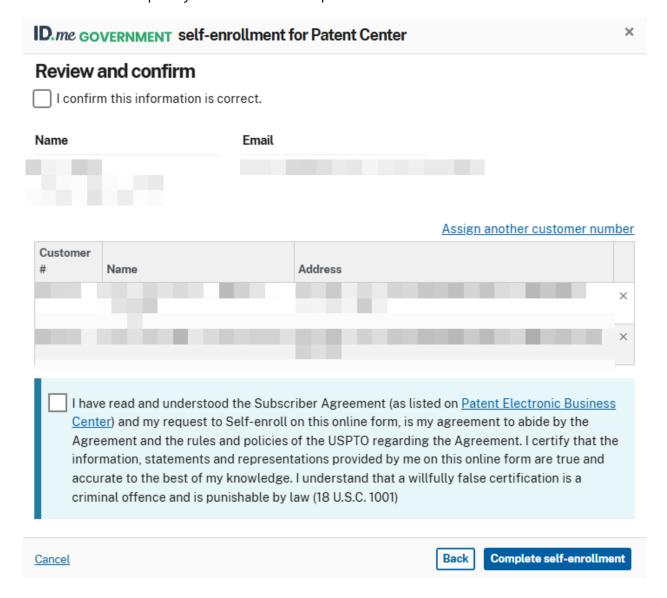
- 1) The customer number is associated with an already enrolled Inventor account. Only one independent inventor can have access to a customer number. Customer numbers cannot be shared amongst a group of inventors.
- 2) The entered customer number is associated with a practitioner registration number. An inventor cannot have access to a customer number that registered patent practitioners have access to.



#### 3: Review and confirm

The "Review and Confirm page" displays the name and email address information including any customer numbers you have associated with your account.

If all the information is correct, check the "I confirm this information is correct" checkbox, and the subscriber agreement checkbox. You can then select the "Complete self-enrollment" button to submit and complete your self-enrollment process.



## 4: Successful completion of self-enrollment

Upon successful completion of self-enrollment, the image below will display and a confirmation email will be sent to your USPTO.gov account email address. You will use this same email address to log into <a href="Patent Center">Patent Center</a> as a registered user.

