

## Open Forum with USPTO Management

Meeting started at 3:40 PM Monday, April 3, 2017; Minutes compiled by John Schlipp, Secretary, PTRCA

Donna Cooper, Director, Public Records Division, OCIO; Christine Kitchens and Rob Berry

Q1-4 were submitted via email before the Open Forum session at the Annual Training Seminar:

Q1 – Why are there delays in some EPO 2010/JPO 2016 patent abstracts?

A1 –EPO is a static abstract database; since 2010 not being updated. JPO abstracts available in PubEast through November 2016. More current abstracts are available in FPRS.

Q2 – Where are pre-1980 patent assignment records located?

A2 –Now at archival with National Archives in College Park, MD. NARA2 Contact Neil Massong regarding record types available.

Q3 – EFS web demo for eFiling and how to file without registering?

A3 – Summer webinar forthcoming...

Q4 – WIPO & PTRC database inconsistencies?

A4 – Beyond what PTRC can answer. WIPO must answer

Open Onsite Ad Hoc Questions:

Q5- Marian Armour-Gemmen, Morgantown, WV, West Virginia Univ. – Must use Espacenet; less clunky. Any plans to improve USPTO patent databases with CPC classifications? A: ROB: Using combination tools to work with CPC, e.g. Espacenet is fine. Classification challenges. Patience and persistence. Read patent documents for CPC classes. CHRIS: Ask Patents End to End during their presentation later this week. Kate Meddaugh, Rochester, NY, Central Library of Rochester & Monroe County: IQ database works well with CPC classes.

Q6- Kate Meddaugh, Rochester, NY, Central Library of Rochester & Monroe County – How long should PTRCs keep resources, e.g. Cassis, VHS, etc. ROB: PTRC office will offer answer with an individual review per each PTRC request.

Q7- Aleta Burge, Miami, FL, Miami Dade Public Library: Not to select which forms a patron should use from the USPTO website. OK to give patrons forms, e.g. provisional forms? ROB: Common sense....instructional techniques pointing out where resources live. Avoid giving advice. Patent Application Manual example that Rob cited.....Use hypothetical neutral examples to avoid giving legal advice.

Q8- Jim Miller, College Park, MD, Univ. Maryland – Follow up to Q4: Comparison of Int'l databases – 900,000 records differ in TESS live vs. dead indicator....ROB asked for questions directly to office for getting an answer in the future.

Q9- Jared Hoppenfeld, College Station, TX, Texas A&M – new Examiner Search tool--- PatFT/AppFT status? ROB: Patents End-to-End presentation later this week for an answer. If that does not answer your question, follow up with PTRC office via email thereafter.

Q7 follow-up- Stacy Etheredge, Boise, Idaho, Univ. Idaho College of Law: Legal advice Q – Law Librarians better at not giving legal advice. Rob replied with great points....

Q7 follow-up- Will Salas, Smithtown, NY, Smithtown Library – Patron sign off form to avoid legal issues mentioned above? Rob replied with more great details regarding attorneys. Pro Bono program attorneys might offer advice on this.

Q10 Connie Wu, Piscataway, NJ, Rutgers Univ – Work together with patrons when need help. Legal Clinic Hours at Rutgers. Could PTRC come up with list...Chris replied that each state has different requirements. University Program besides Pro Bono program. Need for full listing of these programs from across country.

Jared Hoppenfeld, College Station, TX, Texas A&M will share URL later with Pro Se schools.

Christina Byrne of Seattle, Univ. Washington – Law schools are overwhelmed and applications needed for prospective customers. Waiting lists and requirements. Some low costs, some free. Stacy of Idaho added additional comments.

David Zwicky, West Lafayette, IN, Purdue: Additional limitations of Indiana Univ. Law Schools.

Linda Spiro, Houston, TX, Rice Univ. affirmed the specific needs and limits of Pro Bono programs.

Kate Meddaugh, Rochester, NY, Central Library of Rochester & Monroe County – Attorneys speak at their programs. Limited consultations with free info by these attorneys.

Sarah Dobransky, Cleveland, OH, Cleveland Public Library – ½ hour free consulting period from attorneys...

Chris Kitchens noted improvements in attorney database at USPTO based upon feedback from PTRCs. Rob suggested local inventor groups too.

Q11 Connie Wu, Piscataway, NJ, Rutgers Univ: Customers' business marketing needs. Chris Kitchens suggested partnering with Business Librarians in PTRC libraries and local SBDCs.

David Zwicky, West Lafayette, IN, Purdue: – Reminder that some academic programs are not extended to public.

Linda Spiro, Houston, TX, Rice Univ. – Inventor groups usually offer help with marketing contacts.

Q12 Sarah Dobransky, Cleveland, OH, Cleveland Public Library – Trademark searching; what about state Trademark searches. ROB: Some state databases are more basic (name listing only) compared to USPTO TM database. May need private firm for state research. However, federal database could be pre-searched before hand to save money.

Q13 Kathy Berry, Dallas Public Library, Dallas, TX – Issues accessing Commons in PubEAST/WEST. Neil replied: Screen shots submitted by PTRCs were helpful in addressing problem. Further issues need to be reported with screen shot captures. Then it is submitted to their IT people.

Q14 Connie Wu, Piscataway, NJ, Rutgers Univ: Likes Newsclips Daily sent from PTRCP office. Women and Innovation event/exhibition of Inventor Hall of Fame. Literature available? Any other information to distribute to students. ROB: See webpage of event or contact PTRCP office for such related materials. PTRCP office will watch for future programs like these.

Q15 David Zwicky, West Lafayette, IN, Purdue: Contact information for PTRC changes? ROB: when visiting conference note that change in notebook or send email to PTRCP office. Delays? Contact Rob directly.

Will Salas, Smithtown, NY, Smithtown Library: SEAS issue – challenges, ask what is our employee number --- contact Milford Best?. Per Neil protocol is to reply as employee id: 999999 will identify us as PTRC.

Q7 follow-up: Rebecca Kelley, Louisiana State Univ., Baton Rouge, Louisiana: Customer issues with us not providing legal advice when too pushy or how far to go with assisting with forms or legal questions. Rob advised us to follow our library's protocol for such challenges. Use customer service common sense

Q16 Heidi Tebbe, North Carolina State Univ., Raleigh, NC: Dealing with Macs and SEAS...Rob suggested sending emails at PTRCP program for future MAC questions.

Q17 Marian Armour-Gemmen, West Virginia Univ., Morgantown, WV: Census Demographics and Marketing to speak at future program. Rob said they would look into this suggestion.

Judie Triplehorn, Geophysical Institute, Fairbanks, Alaska: The Thomas Register is good marketing tool for our customers.

Q18 PTRC unidentified representative: Prisoner (incarcerated) inventor letters to PTRCs. John Schlipp reminded everyone of the latest Association newsletter article about this topic. Rob suggested having a session in the future. Eileen Fischlschweiger also commented that different library institutions have different rules.

Q19 Jim Miller, Univ. of Maryland, College Park, MD: Provisional patent applications are searched if Non-provisional applications claim their priority benefits, right? Neil said that a provisional application is filed then only checked if followed up with a non-provisional application later.

Dave Irvin, New Mexico State Univ. Library, Las Cruces, NM – Grant funding policies?  
Chris: Julie Mason at a PTRC was a grant funding specialist.

Suzanne Reinman, Oklahoma State University, Stillwater, OK Q: Mobile Apps IP protection? ROB: Copyright Compendium; PAT EXAM MANUAL too.

Open Session wrapped up at 4:55 PM.