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Catalog of USPTO Training Courses 2020-2021

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United States Patent and Trademark Office

PO Box 1450

Alexandria, VA 22313-1450

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FOIA.gov

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UNITED STATES PATENT AND TRADEMARK OFFICE

OFFICE OF THE GENERAL COUNSEL

November 23, 2021

VIA EMAIL

Re: Freedom of Information Act (FOIA) Request No. F-22-00032

The United States Patent and Trademark Office (USPTO) FOIA Office has received your e-mail dated Monday, November 1, 2021 requesting a copy of the following documents pursuant to the provisions of the Freedom of Information Act, 5 U.S.C. § 552:

Request a copy of each catalogue of USPTO training courses: [By way of explanation, the Office develops the examining corps by providing a range of technical and legal training opportunities, including training on subjects relating to, for example, 35 U.S.C. §102; 35 U.S.C. §103; 35 U.S.C. §101; 35 U.S.C. §112; and Search. Additionally, the Office continues to run pilot programs to train stakeholders on Office practice and procedure to improve applicant submissions, including initial filings and Office action responses, and to improve collaboro1don between applicants and examiners.]

The USPTO identified 23 pages of documents that are responsive to your request. A copy of this material is enclosed.

You may contact the FOIA Public Liaison at 571-272-9585 for any further assistance and to discuss any aspect of your request. Additionally, you may contact the Office of Government Information Services (OGIS) at the National Archives and Records Administration to inquire about the FOIA mediation services they offer. The contact information for OGIS is as follows: Office of Government Information Services, National Archives and Records Administration, 8601 Adelphi Road-OGIS, College Park, Maryland 20740-6001, e-mail at ogis@nara.gov; telephone at 202-741-5770; toll free at 1-877-684-6448; or facsimile at 202-741-5769.

Your request is considered complete with full disclosure. However, you have the right to appeal this initial decision to the Deputy General Counsel, United States Patent and Trademark Office, P.O. Box 1450, Alexandria, VA 22313-1450. An appeal must be

received within <u>90</u> calendar days from the date of this letter. <u>See</u> 37 C.F.R. § 102.10(a). The appeal must be in writing. You must include a copy of your original request, this letter, and a statement of the reasons why the information should be made available and why this initial denial is in error. Both the letter and the envelope must be clearly marked "Freedom of Information Appeal."

The processing fee was less than \$20.00, and is hereby waived.

Sincerely,

Charletta Blackshear USPTO FOIA Specialist

Charletta Clackstean

Office of General Law

Refresher Training (cont.)

Automation Information Systems (cont.)

- INSPEC, Ei Compendex, MEDLINE, and more: Introduction to Searching ProQuest Dialog Databases
- NPL Overview (Business Methods/ Chemical/ Electrical/ Mechanical)
- PE2E DAV: Essentials for Examiners
- PE2E DAV: Features for Design Examiners

Master Class

This program is for examiners with at least one year of patent examining experience who want to learn more. Master Classes delve deeper into specific topics touched on in the Examiner Refresher Training Program.

Master Class Courses

- 1.130 AIA Declarations of Attribution or Prior Public Disclosure
- 1.131 Affidavits
- 1.132 Affidavits Commercial Success
- 1.132 Affidavits Unexpected Results
- CPC Level 1 Class Part I
- CPC Level 1 Class Part II
- · Examination of Ranges
- Pre-AIA 37 CFR 1.132 Attribution Declarations



United States

Patent and Trademark Office
600 Dulany Street
Alexandria, Virginia 22314

UNITED STATES
PATENT AND TRADEMARK OFFICE



Office of Patent Training



Examiner Refresher Training & Master Class Programs

FY2018

www.uspto.gov

Office of Patent Training

Examiner Refresher Training & Master Class Programs

How to Enroll

To register, log into the USPTO Learning Center:

https://doc.csod.com/client/doc/default.aspx

Use the Search bar to search "Refresher" or "Master"

For brief course descriptions go to:

http://ptoweb.uspto.gov/patents/opt/documents/opt-training-catalog.pdf

Examiner Refresher Training

This program is designed to enhance an examiner's knowledge and skills in procedural and legal topics pertaining to patent examination.

Refresher Training Courses

Practice and Procedure

- 35 U.S.C. 102 Priority Pre AIA
- 35 U.S.C. 102 and 103: Special Topics with AIA Updates
- 35 U.S.C. 103 Response to Applicant's Arguments with AIA (FITF) Updates
- 35 U.S.C. 103 with AIA Updates
- 35 U.S.C. 103 Workshop with AIA Updates
- 35 U.S.C. 112(a), Enablement with AIA Updates
- 35 U.S.C. 112(a), Written Description with AIA Updates
- Affidavit Practice Under 37 CFR 1.131 -Pre AIA
- Affidavit Practice Under 37 CFR 1.132 with AIA Updates
- · After Final Practice and RCE
- AIA FITF
- Appeal Practice
- Applicant's Reply with AIA Updates
- Best Practices in Compact Prosecution Awareness Workshop
- Claim Interpretation with AIA Updates
- Developing Efficient Habits in Examination
- Docket Management

Refresher Training (cont.)

- Double Patenting with AIA Updates
- Examination of Ranges
- Examiner Proposed Claim Amendments
- Examining PCT National Stage (371) and "Bypass" Applications - Part I
- Examining PCT National Stage (371) and "Bypass" Applications - Part II
- · How to Write Effective Rejections
- Pro Se Pilot Program & Working with Pro Se Applicants
- Restriction Practice
- Search Strategy with AIA (FITF) Updates
- Search Workshop
- · When to Make an Office Action Final
- Writing Persuasively

Automation Information Systems

- CPC Scheme Navigator
- CPC Searching in EAST and WEST
- eMPEP
- Foreign Patents
- InnovationQ Plus (IP.com)

Office of Patent Training

UNCONTROLLED COPY, if printed

OPT Training Catalog

http://ptoweb.uspto.gov/patents/opt/documents/opt-training-catalog.pdf

Stakeholder Training on Examination Practice and Procedure (STEPP) brochure

https://www.uspto.gov/sites/default/files/documents/STEPP%20Flyer.pdf

Patent Examiner Technical Training Program (PETTP) flyer

https://usptogov.sharepoint.com/sites/e0c92f19/PETTPDocuments/Forms/AllItems.aspx?id=%2Fsites% 2Fe0c92f19%2FPETTPDocuments%2FPETTP%2PPETTP%20Publicly%20Posted%20Files%2Fpettp%2Dflyer%2Dfy18%2Epdf&parent=%2Fsites%2Fe0c92f19%2FPETTPDocuments%2FPETTP%20Publicly%20Posted%20Files&p=true&slrid=6a88a69e-40ce-7000-454f-154f73e5da34

Press Ctrl + Click to follow link or copy and paste the link into Internet Explorer.

Patent Management Training



Legal, Practice & Procedure Training



United States

Patent and Trademark Office

600 Dulany Street

Alexandria, Virginia 22314

UNITED STATES
PATENT AND TRADEMARK OFFICE



Office of Patent Training



Training Programs

Fiscal Year 2018



Continuing Education Training



New Examiner Training

Entry Level Training Program

Entry Level examiners are provided an in-depth review of U.S. statutes and rules pertaining to patent examination. This is a 2-phase 12-month program with an initial 4-month residence in the Patent Training Academy. Classroom studies include exercises and coursework focused on patent examination practice and procedures as they apply to the examination of patent applications at the USPTO, automation tools, soft skills, and technical training.

Patent Management Training

New Patent Manager Training & Development Program

This training provides a new Patent Manager with skills needed to be a successful supervisor. The program is a collaborative effort between the Office of Patent Training, the Technology Centers, the Office of Patent Information Management, and the Office of Human Resources.

Patent Management Training (continued)

Management Training Academy

This program is designed for patent managers with more than one year of experience. Courses offered focus on coaching and mentoring and senior leadership development.

Train the Trainer

A program given to new Trainers who manage a lab of new examiners. The courses concentrate on the daily operation and supervision of examiners in the lab at the Patent Training Academy. The modules are a combination of theory and application and include adult learning, coaching and mentoring, effective feedback, presentation skills, lab management and supervision, and learning styles.

Legal Practice & Procedure Training

Examiner Refresher Training

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Legal, Practice & Procedure Training (continued)

Master Class Program

This program is for examiners with at least one year of patent examining experience who want to learn more. Master Classes delve deeper into specific topics touched on in Examiner Refresher Training.

Patent Quality Chats for Patent Examiners

This series provides information on procedural and legal topics relating to patent examination. The chats are conducted as webinars that include a brief presentation (approximately 30 minutes) followed by Q&A. Each presentation targets a component(s) of a larger procedural or legal concept.

Legal Lecture Series

This training is offered periodically to examiners based on major court decisions and Office policies.

In-House Patent Law and Evidence Legal Course

This training is for GS-12 and GS-11 examiners. Training covers authoritative court decisions on statutory issues under 35 U.S.C. 101, 102, 103 and 112 and the handling of evidence during the examination of patent applications.

Continuing Education Training

Program Overview

This program is designed to enhance a patent employee's knowledge in technical and legal topics pertaining to the examination of patent applications.

Courses Offered

- Stakeholder Training on Examination Practice and Procedure (STEPP)
- Patent Examiner Technical Training Program (PETTP)
- Site Experience Education (SEE) Program
- Patent Examining for Non-Examiners (PEFNE)
- Updated Automation Tools Training (in coordination with OPIM)
- Patent Administrative and Technical Support Staff Training
- Tuition Assistance Program -Non-Duty Hours Legal Studies (Law School) Program (Budget Dependent)
- Tuition Assistance Program -Non-Duty Hours Technical Training Program (Budget Dependent)

Patent Management Training

Legal, Practice & Procedure Training



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Training Programs

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- Tuition Assistance Program -Non-Duty Hours Technical Training Program (Budget Dependent)

Available to you —

- ⇒ Career and Leadership Development
- ⇒ Legal Practice and Procedure Training
- ⇒ Automation Tools Training
- ⇒ Training for Non-Examiners
- ⇒ Retirement and Financial Planning

All in one place, easy to find and enroll!



Office of Patent Training

ptoweb.uspto.gov/patents/opt

The Office of Patent Training (OPT) is committed to educational leadership, excellence, and quality in our products and services by:

- Providing comprehensive training programs in innovative and progressive environments to employees of the Patent organization and by
- Providing education and training in coordination with our partners in the Patent community.

Enterprise Training Division

ptoweb.uspto.gov/ptointranet/ohr/ employees/training

The Office of Human Resources (OHR), Enterprise Training Division (ETD) implements agency-wide training, leadership and employee development programs to increase employee engagement and enhance organizational excellence at the USPTO. In consultation with the business units, the ETD:

- Assesses agency-wide employee and leadership training and development needs;
- Implements competency-based integrated training and development programs;
- Provides training and development guidance to managers and employees;
- Supports consistent training policies and practices throughout the agency;
- Encourages sharing of training and development best practices across the agency; and
- Builds strategic partnerships with all business units to support agency-wide needs.

Patent Employee Development Opportunities





Career and Leadership Development

The USPTO Leadership Development Program (http://ptoweb/LDP) is open to all employees and includes live and computer-based courses on topics such as time management and interpersonal skills.

The Office of Patent Training has Career Development Learning Plans to help you identify and plan for training on the skills and competencies needed to support your long-term goals. To find these, go to the <u>USPTO Learning Center</u> and search for Patent Learning Plan.

Not sure where to start? Try the Enterprise Training Division's 180 Degree Leadership Assessment, a tool to help you assess where to focus your self-development efforts to gain knowledge, skills, and abilities related to your role in accomplishing the USPTO mission.

Legal Practice and Procedure Training

Need to refresh or enhance your understanding of a legal practice and procedure topic?

The Office of Patent Training offers a variety of computer-based (CBT) and instructor-led patent examination courses.

CBT courses available on-demand include FITF, CPC, Double Patenting, 37 CFR 1.132 Affidavit Practice, and 35 U.S.C. 112 (b), (d), and (f).

Automation Tools Training

From EAST to WEST, from Adobe to Microsoft, training and resources are available to help you master the tools you need to boost productivity.



Training for Non-Examiners

Patent Examination for Non-Examiners is designed to help employees who work within the patent system gain a better understanding of it.

Many training opportunities, such as Career and Leadership Development programs, are open to all USPTO employees.

Retirement and Financial Planning

The USPTO's Enterprise Training Division offers in-person and webcast training on financial planning and your Federal benefits at three different career points: early career, mid-career and pre-retirement.



Find all this, and more, at: https://doc.csod.com



The USPTO is requesting voluntary assistance from **Scientists**, **Engineers**, **Professors**, and **Industrial Designers** to participate as guest lecturers for its Patent Examiner Technical Training Program.

Volunteer your time and expertise as a guest lecturer to ensure patent examiners keep pace with state of the art developments. Visit the website below to see our list of past participants and topics.

Flexible Presentation Options -

PETTP supports the flexibility to present training materials through several different delivery options:

- On-site at USPTO headquarters Alexandria, Va., or at one of our four regional offices located in Detroit, MI; Denver, CO; San Jose, CA; or Dallas, TX.
- From the presenter's location via webinar.

Sign up today!

If you are interested in participating as a PETTP guest lecturer, please submit your request via the online form available at the PETTP website:



or by sending an email request to Examiner_Technical_Training@uspto.gov













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- From the presenter's location via webinar.

Sign up today!

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www.uspto.gov/patent/initiatives/patent-examiner-technical-training-program-pettp-0



or by sending an email request to Examiner_Technical_Training@uspto.gov















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Stephen Koziolstephen.koziol@uspto.gov

Patent Training Academy - Phase 1 Curriculum

Week 1

- Collaboration Tools
- Intro to the UL and UL Utilities
- Overview of the 2-Phase Program
- Introduction to Patent Systems •
- Patent Examiner & Flow of an Application .
- Types of Applications
- **Examination Toolkit**
- **DAV-Basics**
- Training Application Part 1 Understanding the **Training Application**

Week 2

- Claim Interpretation Pre-Lecture
- Welcome to the USPTO Family
- 35 U.S.C. 101 Introduction
- Training Application Part 2 Basic Requirements to File and Formalities
- Automation Information Systems (AIS) Overview
- Restriction Practice Part 1
- 35 U.S.C. 112(b) and (d)
- 35 U.S.C. 112(f): Introduction
- Introduction to Patent Classification Parts 1 & 2 .
- PE2E Search Part 1
- MPEP Overview
- Prior Art Rejections Introduction •
- PE2E-DAV Part 1
- Training Application Part 3 Planning a Search

Week 3

- **eMPEP**
- 35 U.S.C. 112(a)
- Training Application Part 4 §101 and §112 •
- 35 U.S.C. 102(a)(1) Introduction-AIA .
- 35 U.S.C. 102(a)(2) Introduction-AIA
- 35 U.S.C. 102(b) Exceptions Introduction-AIA •
- 35 U.S.C. 103 Part 1 of 3
- Training Application Part 5 Case Reporting I
- **Double Patenting** .
- Training Application Part 6 Searching and Identifying Prior Art

- Training Application Part 7 Mapping Art to Claims
- Training Application Part 8 Case Reporting II
- OC Part 1

Week 4

- Training Application Part 9 Office Action
- Examiner Performance Appraisal Plan (PAP)
- Search Strategy
- Introduction to Production System
- Restriction Practice Part 2
- STIC (I): STIC Services Overview
- Claim Interpretation Part 1
- Training Application Part 9 Office Action Review
- Claim Interpretation Intermediate: Exercises
- 35 U.S.C. 103 Part 2 of 3
- Effective Filing Date of Invention and Exercises -AIA

Week 5

- Training Application Restriction Requirement
- Information Disclosure Statement (IDS)
- Classification Resources Tools
- Search Lab 1
- Meet Home SPEs and Art Units
- Claim Interpretation Part 2
- Introduction to the TC Search Training (TC 2600 Examiners Only)
- Gender Identity & Sexual Orientation Training
- NPL on ProQuest Dialog for Electrical/ Mechanical Arts (TCs 2100/ 2400/ 2600/ 2800/ 3600/3700)

Week 6

Search Lab 2

@uspto @usptojobs

- Technology Training (TC 2600 Examiners Only)
- 35 U.S.C. 101 Subject Matter Eligibility Parts 1 &
- Introduction to Technology Center





Week 7

- STN Basics & Exercises (TC 1600/1700/2800 Examiners)
- PCT
- 371 and 111(a) Bypass Parts I & II
- Unity of Invention
- CPC-based Application Routing and Examination Time
- Introduction to Patent Classification Part 3
- Docket Management

Week 8

- NPL on ProQuest Dialog for Pharma/Chemical Arts (TC 1600 & 1700 Examiners)
- Introduction to Searching on SciFinder (TC 1600/1700/2800 Examiners)
- Tracking Cases & Organizing Your Biweek
- STIC (II): NPL Overview EL
- Interview with an Examiner Panel
- Classification and C* Designation Guidance
- STN Substance (TC 1600/1700/2800 Examiners)
- STN Structure Part 1 (TC 1600 & 1700 Examiners)
- STN Structure Part 2 (TC 1600 & 1700 Examiners)

Week 9

- 35 U.S.C. 101 Utility: Exercises (TC 1600)
- NPL on ProQuest Dialog for Business Methods (TC 3600BM Examiners)
- Basic SciFinder Substance Searching (TC 1600/1700/2800 Examiners)
- 35 U.S.C. 112(f) Broadest Reasonable Interpretation and Definiteness of § 112(f) Limitations
- Examining Functional Claim Limitations: Focus on Computer/Software-related Claims
- 35 U.S.C. 112(f) Evaluating § 112(f) Limitations in Software-Related Claims for Definiteness under 35 U.S.C. 112(b)
- Functional Language Workshop 2016: Claim Interpretation and Definiteness Under 35 U.S.C. 112(b)

Week 10

Examine Patent Applications

Week 11

- PE2E DAV Part 2
- PE2E Search Part 2
- PE2E Search Study Hall
- OC Part 2

Week 12

- STIC (III): Searching NPL
- Foreign Patents I Overview
- Foreign Patents II Derwent
- Global Dossier

Week 13

- 35 U.S.C. 103 Part 3 of 3
- 103 Writing Exercises
- TC 2100 Specific Training (TC 2100 Examiners only)

Week 14

- Restriction Practice Part 3
- Advanced Search Topics and Alternatives to PE2E DAV

Week 15

- Record Sharing Platform Employee Training
- The Importance of Patent Examining
- Decision Making
- AIA FITF Indicator Training
- Compact Prosecution
- Automation Tools Q&A

Week 16

- Conducting an Interview
- · Refresher Examiner Tools and Services
- Phase 2 Expectations
- Applicant's Reply Final Rejection
- Work Schedules, Leave and Overtime
- Training Application Part 10 Amendment Workshop





Patent Training Academy - Phase 2 Curriculum

Month 7

- Double Patenting Review and Practical Tips
- OPQA
- 35 U.S.C. 102 and 103 Special Topics
- How to Strengthen Examiner Office Actions
- Docket Management Revisited
- Response to Amendments Q & A
- After Final Practice and RCE
- Training Opportunities
- · How to Read and Understand Case Law
- Allowance and Issue
- Interview Practice

Month 10

- MPEP Review Chapter 600
- MPEP Review Chapters 800 & 1300
- MPEP Review Chapter 700 Part 1
- MPEP Review Chapter 700 Part 2
- MPEP Review Chapter 2100 Part 1
- MPEP Review Chapter 2100 Part 2
- Quality Element Beyond the First Year
- USPTO Career Opportunities
- Affidavits 1.132

www.uspto.gov

- MPEP Review Chapter 2100 Part 3
- Understanding Practitioner Constraints During Patent Prosecution

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Site Experience Education (SEE) Program

- The USPTO funds travel costs for patent examiners to visit sites of innovation within the continental U.S.
- Provides patent examiners with the opportunity to see technology first-hand at commercial, industrial, and academic institutions within the continental U.S.
- Helps improve the quality of patent examination by demonstrating the latest technology to examiners
- Hosts can interact directly with patent examiners and gain a greater understanding of the patent system









USPTO Seeking Organizations to Participate in the Site Experience Education (SEE) Program

Showcase Your Real-World Technologies • An Opportunity to Conduct On-Site Training









If you have questions or would like more information on the SEE program, please email us at: Site-Experience-Education@uspto.gov







Gain an Examiner's Perspective



Stakeholder Training on Examination Practice and Procedure (STEPP)

Training delivered through STEPP is designed to provide external stakeholders with a better understanding of how and why an examiner makes decisions while examining a patent application. In person courses are led by USPTO trainers and based on material developed for training employees of the USPTO.

Program Description

The STEPP program provides unique, day-in-the-life, experiences to those attending training. Material used within the program is derived from training delivered to patent examiners and other USPTO employees.

What does STEPP Cover?

The same examination practice and procedure training provided to USPTO staff is now available to external stakeholders.

Learn what an examiner must consider in preparing an office action, and what examiners are taught to interpret an applicant's disclosure.

Why Participate?

STEPP provides perspective by detailing what an examiner considers in preparing an office action. Training focuses on how an examiner is taught to use the MPEP to make patentability determinations and write an office action. Gaining perspective of an examiner's point of view will increase your situational awareness which can aid in compact prosecution.

Payment and Credit

STEPP courses are free of charge. The USPTO will apply for CLE accreditation for specific courses within the program. Please contact STEPPtraining@uspto.gov for additional information.

Please visit the STEPP website for more information:

http://www.uspto.gov/patent/initiatives/stakeholder-training-examination-practice-and-procedure-stepp







Upcoming Events

FY 2020 In-Person Training Title	Dates	Audience	Location	Registration
Agent/Attorney 3-Day Course	October 16-18, 2019	*Agents and Attorneys	New York, NY - Ted Weiss Federal Building	July 29-August 25, 2019
Agent/Attorney 3-Day Course	January 28-30, 2020	*Agents and Attorneys	Miami Beach, FL - Miami Beach Regional Library	October 7- November 10, 2019
Agent/Attorney 3-Day Course	March 17-19, 2020	*Agents and Attorneys	Seattle, WA - Seattle Public Library	October 21- December 15, 2019
Agent/Attorney 3-Day Course	April 28-30, 2020	*Agents and Attorneys	Boston, MA – Boston Public Library	January 13- February 16, 2020
Agent/Attorney 3-Day Course	July 14-16, 2020	*Agents and Attorneys	Los Angeles, CA	April 6-May 10, 2020
Inventor 3-Day Course	September 15-17, 2020	**Inventors	TBD	June 8-July 12, 2020

^{*}Agents and Attorneys - Those registered to practice law in patent matters before the USPTO ** Inventors - Those not registered to practice law in patent matters before the USPTO

Note: All courses, times, and dates are subject to change and may be canceled at any time prior to registration opening.



Access to Recently Updated **Examination Training**



Virtual Instructor Led Training (vILT)

vILT provides a vehicle by which recent examination training is shared with the external stakeholders.

Program Description

VILT is designed to allow our stakeholders to be briefed on a variety of focused topics related to examination practice and procedure derived from recent training delivered to experienced USPTO examiners.

Why Participate?

vILT courses are led by USPTO trainers and provided in an interactive online format allowing external stakeholders to participate remotely. Training focuses on in-depth discussion on selected topics based on recent updates to the current examination practice and procedure allowing external stakeholders to gain a better understanding of the most up-todate examination training.

Payment and Credit

vILT courses are free of charge. The USPTO will apply for CLE accreditation for specific courses within the program. Please contact vILT@uspto.gov for additional information.

Please visit the vILT Webiste for more information.

http://www.uspto.gov/patent/patent-quality/virtual-instructor-led-training-vilt











Upcoming Events

Title	Dates	Audience	Duration	Registration
Unity of Invention	December 10, 11, and 12, 2019**	All	2 Hours	October 15 - November 17, 2019
Save the Date	February 11, 12, and 13, 2020**	===		December 9, 2019 - January 26, 2020
Save the Date	April 14, 15, and 16, 2020**	_	~~	March 2 - March 29, 2020
Save the Date	May 12, 2020	Agents and Attorneys	-	March 16 - April 12, 2020
Save the Date	June 9, 10, and 11, 2020**		<u></u>	April 27 - May 25, 2020
Save the Date	June 23, 2020	*Agents/Attorneys		May 11 - June 7, 2020
Save the Date	August 11, 12, and 13, 2020**	-	-	June 29 - July 26, 202

Note: All courses, times, and dates are subject to change and may be canceled at any time prior to registration opening. All vILT sessions will begin at 1 p.m. ET on the day of training unless otherwise notified.



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**Additional Wednesday and Thursday sessions will be held if the maximum capacity for Tuesday session has been exceeded.

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