



AR LEGAL SOLUTIONS

Patent Perspectives Quarterly

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Welcome!

Thank you for subscribing to our newsletter, *Patent Perspectives Quarterly*. This issue offers tips for using artificial intelligence tools to increase efficiency and improve workflows, important practice notes, Patent Center improvements, and more.

In each issue, we include tips and tricks based on real-world inquiries from paralegals and patent attorneys. We would love for this section to be interactive—feel free to send us additional questions to address in the next newsletter to newsletter@arlegalsolutions.net.

Top 5 FAQs from Patent Professionals

1. Does an inventor's declaration have to be filed before the issue fee is paid for both design and utility applications?

Yes. The inventor's declaration must be filed before paying the issue fee. Otherwise, a substitute statement is required prior to payment of the issue fee.

2. What are the specific rules when filing a patent application with color drawings?

You must file a petition requesting the acceptance of color drawings under 37 CFR § 1.84(a)(2). Make sure that your specification contains the correct color drawing language in the brief description of the drawings. Each figure with color needs to be mentioned in the description. There is also a fee of \$150.

3. We filed an application as a small entity but have now determined it should have been filed as a large entity. Do we need to pay the deficiency based on the current fee schedule or can we pay based on the fee schedule in place on the day we filed the application?

You will have to pay the deficiency fee based on the current fee schedule.

4. What are some resources for paralegals to stay current on USPTO rules, fees and other developments.

The USPTO itself is a great resource. Paralegals should go to the [USPTO Subscription Center](#) to sign up for news and alerts. WIPO also offers various newsletters and alerts – [subscribe here](#). If you haven't already, please subscribe to have our newsletter delivered directly to your Inbox > [Patent Perspectives Quarterly](#)!

5. I haven't filed an application by mail for many years, if Patent Center is down what is the procedure for filing if fax is not an option?

Include all documents that would be filed electronically plus a return postcard receipt. We recommend including a transmittal letter/cover page. Include either a check or your deposit account number and don't forget the surcharge for submitting an application non-electronically. Another good tip is to include the attorney reference and transmission date in the header and footer of documents to be sure it's clear what goes together.

How Paralegals Can Use Artificial Intelligence in Their Daily Work

There is significant reluctance in the patent law world to incorporate AI. Uncertainty around which tools to adopt, the time commitment required to test AI-assisted tools and a lack of confidence in the accuracy of these tools are the most common reservations we hear.

While these are valid concerns, law firm clients are moving toward using AI-assisted tools and expect their outside counsel to do the same. Patent paralegals are well positioned to become influencers and implementers of AI at their firms, given the complex and repetitive nature of many of our daily tasks — from reviewing documents for accuracy to monitoring deadlines, which can be time-consuming and error-prone. AI is transforming many of our favorite tools in ways that are reshaping legal workflows, and patent law is no exception.

For patent law paralegals, AI can be a powerful ally in improving efficiency, reducing administrative burdens, and allowing more time to focus on high-value tasks. Here's how AI is already helping — and how it can be used more widely — in the day-to-day work of patent law paralegals.

Managing Filing Deadlines and Docketing

Docketing deadlines across jurisdictions is critical in patent prosecution and maintenance. AI-enabled docketing systems can automatically extract dates from USPTO communications and international filings, populate docket entries, and alert users to approaching deadlines.

Examples: Tools like Alt Legal and Anaqua use AI to read and update patent portfolios automatically.

Benefits:

- Fewer missed deadlines
- Automatic calendar management
- Reduced manual data entry

Drafting and Reviewing Routine Documents

AI can assist paralegals in generating first drafts of routine patent forms, IDS submissions, and filing cover sheets. Document automation platforms like Litera, HotDocs, or custom-built tools using GPT-based APIs can pre-fill templates based on case data.

Benefits:

- Faster document preparation
- Standardized formatting and language
- Time saved on routine tasks

Monitoring Patent Status and Legal Changes

AI systems can continuously monitor patent statuses through the USPTO, WIPO, or EPO and alert users of changes, new citations, or potential litigation. Some platforms even track competitor patent activity or alert you to expired or abandoned patents.

Benefits:

- Real-time updates without manual checking
- Competitive intelligence
- Early warning for legal strategy planning

Organizing and Summarizing Complex Patent Portfolios

Patent paralegals often manage large volumes of documents. AI-based document management systems can classify, tag, and summarize patent records, correspondence, and litigation documents automatically.

Benefits:

- Easier access to relevant files
- Document retrieval and version control
- Streamlined team collaboration

Client Communication and Intake Support

AI chatbots or intake systems can help gather basic information from inventors, schedule meetings, and answer common questions. While still emerging in legal practices, these tools have potential for handling non-sensitive, repetitive communications.

Benefits:

- Less time spent on routine client questions
- Faster onboarding of new cases
- Increased client satisfaction with quick responses

Challenges and Ethical Considerations

While AI brings numerous benefits, it's not a replacement for the human judgment and oversight that patent paralegals provide. AI systems can misinterpret language, especially in highly technical or nuanced areas. Paralegals must verify AI-generated work and remain alert to privacy, confidentiality, and compliance issues.

Additionally, firms must ensure their AI tools are well-integrated, secure, and updated regularly. Training is essential so paralegals know how to use these tools effectively without over-relying on them.

USPTO Modernization Efforts

Effective May 13, 2025, the USPTO began accelerating the Issue Dates for patents. Previously, the time between Issue Notification and Issue Date averaged around three weeks. The USPTO is reducing that time to approximately two weeks.

Publishing electronic grants via Patent Center and eliminating redundancies in the process has reduced the time between grant notification and the issuance date. Also, by shortening the wait time between the Issue Notification and the Issue Date, patent applicants may avoid the need to file a Quick Path Information Disclosure Statement.

The shortened time between the date of receipt of the Issue Notification and the Issue Date means that clients will receive earlier patent protection for their innovations.

****Note on Continuing Applications:** To meet the co-pendency requirement, applicants must file continuing applications (e.g., continuation, divisional, or continuation-in-part applications) before their parent applications are issued or abandoned. Under this accelerated patent issuance timeline, care should be taken to ensure that continuing applications are timely filed in accordance with the co-pendency requirement.

Free and Low-Cost AI Tools

As a small business, we look for free and low-cost tools that have AI integration. We have compiled a short list of those we find most helpful below. Feel free to reach out if you would like to discuss the specifics of how we use these tools or to share some of your own favorites.

Grammarly (FREE)

Grammarly is an add-on tool that works within Word and Outlook to provide immediate suggestions for improving grammar and word choices. You can also copy and paste your content into the tool to get suggestions on tone and conciseness. Some ways that it can come in handy for legal professionals include:

- Giving feedback in a way that sounds less negative
- Taking the emotion out of an email when you are disappointed or frustrated
- Making your emails shorter or incorporating a bulleted list
- Adding a bit of fun to content for marketing or internal announcements

Grammarly will begin to learn the tone that you typically use, but you can set specific tones and use prompts to get the output you're looking for. Sometimes Grammarly can be a bit too helpful in that it makes suggestions quite often.

Sanebox (\$4 - \$20/mo. depending on the plan)

Sanebox is a tool for eliminating Inbox clutter. It works with every email client, such as Outlook, Gmail and Apple's mail client. Here are the features we like:

- If you send an email and haven't received a reply, Sanebox puts it into a no reply folder and will remove it once a reply comes in
- Newsletter subscriptions automatically to into a separate folder
- You can train it to identify which emails are important, such as emails from clients, and it will keep those in the main Inbox
- It only reads the subject line, so it is not gathering confidential information that resides in the body of the email

Mail Butler (\$4 - \$30/mo. depending on the plan)

Mail Butler is another email organization tool that can be used with Sanebox. This is an app that you click within Outlook. Some key features include:

- Summarizes your emails
- Allows you to snooze emails
- Will create draft responses
- Identifies whether the recipient has opened your email

A Note About the NEW Continuing Application Fee

The USPTO recently introduced a Continuing Application Fee (CAF) to address the growing backlog of continuing applications and encourage timely prosecution. Effective January 19, 2025, this fee applies to certain continuing applications based on their timing relative to the earliest benefit date (EBD).

The CAF applies to all utility, plant, and design continuing applications that are filed more than six years after their EBD. The fee for applications filed more than 6 years but not more than 9 years after their EBD is \$2,700 (\$1,080 for small entities). The fee for applications filed more than 9 years after their EBD is \$4,000 (\$1,600 for small entities). If the fee is not paid when due, the USPTO will not acknowledge priority claims to applications filed six or more years prior. To reinstate the priority claims, applicants must submit a "corrected" Application Data Sheet (ADS) and pay the applicable CAF within four months of the continuing application's filing date. The fee can be paid any time after the 4-month deadline, HOWEVER, the applicant will also have to pay the petition fee to correct the priority on top of the CAF fee.

For more information refer to the USPTO's [Quick Reference Guide](#).

Project Management Software is a Game-Changer for Legal Pros

We are staunch advocates for project management software! Excel spreadsheets and email folders are not effective ways to manage the complex, collaborative and time-sensitive nature of the work patent law professionals perform. Especially with the availability of these game-changing and often inexpensive tools.

The most common frustrations we hear from paralegals whose firms have not implemented a project management tool include:

- I get too many emails!
- Keeping track of projects using Xcel spreadsheets is cumbersome.
- We work mostly virtually, so it's not as easy to "check in" on projects.

A few commonly used tools include Planner (which your firm may already have available as part of your Microsoft 365 Suite), ClickUp, Slack, and a number that are customized for law firms. Most are user friendly and are available at various price points. Paralegals whose firms do implement project management software find that attorneys are quick to adopt the tool and end up loving it as they feel more in control when they can see where projects are in the pipeline.

AR Legal Solutions has helped a number of clients transition to using project management software. We have experience with several of the tools currently available and can offer suggestions for workflows based on our many years of using them in patent practice. We would be happy to assist you on your project management journey.



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