



# Welcome!

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](mailto:newsletter@arlegalsolutions.net).

**1. I am trying to file 4 US national phase applications based on 1 PCT. I am getting feedback that you can only file 1 national phase from 1 PCT. How do I file the others?**

**2. I've never filed a bypass CIP before. What do I need to file? How is it different from a 371 national phase application?**

**3. I'm filing an RCE with an IDS in response to a final rejection. Do I have to pay an IDS fee with the RCE?**

**4. What do I file when changing inventors' names during issuance as the ADS will not match the Declarations?**

5. **New IDS fees question: We have a patent application filed in 2023 with a cumulative count under 200 references. We have an additional 4 references to be cited. Do I need to pay an additional fee?**

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## Effective Collaboration for Legal Teams

A strong working relationship between attorneys and their legal assistants or paralegals is crucial for an efficient and productive practice. Understanding the best ways to communicate, prioritize tasks, and show appreciation can help foster a positive work environment. Here are some key dos and don'ts to keep in mind.

### Prioritization and Deadlines

#### For Attorneys:

- Be mindful of deadlines, both court-mandated and those promised to clients.
- When setting deadlines for clients, be realistic about the time needed for preparation and filing.
- Inform your legal assistant or paralegal about promised deadlines as early as possible. They often juggle multiple assignments, and advance notice helps them manage their workload efficiently.
- Prioritize tasks effectively to support work-life balance and minimize excessive overtime, which helps retain valuable staff. If it's not due today, consider allowing it to wait until your support professional can commit.

#### For Support Professionals:

- If workload constraints make it difficult to meet a deadline, communicate with your attorney to determine what must be completed immediately.
- Instead of saying, "I can't" or "I'm too busy," seek solutions. Engage leadership if necessary to redistribute tasks.
- Be proactive. Many legal projects take time, so avoid last-minute rushes by setting calendar reminders well in advance.

### Communication

#### For Attorneys:

- Build strong working relationships with your support professionals by setting clear expectations and avoiding micromanagement.
- Keep support professionals informed about case developments, including tasks that may shift between attorneys. This ensures better prioritization and time management.
- Provide constructive feedback to help your support staff grow and enhance their efficiency.
- Encourage open communication and two-way feedback for a collaborative and productive working environment.
- Give clear instructions without unnecessary explanations, trusting your LAAs and paralegals to ask for clarification if needed.
- Treat your assistant with the same professionalism and respect you extend to fellow attorneys.

#### For Support Professionals:

- Regularly check in with your attorney about their workload and upcoming deadlines.
- Schedule periodic meetings to discuss ongoing work and expectations.
- Keep communication lines open and provide feedback about what is or isn't working.
- Listen carefully to instructions and ask for clarification when needed.
- Show respect to attorneys, fostering mutual professionalism and collaboration.

## Effective Collaboration (cont.)

### Efficiency and Accountability

#### For Attorneys:

- Avoid holding onto dated correspondence and Patent Office documents, as continually re-dating documents is inefficient and wastes time.
- Never use an LAA or paralegal's initials on any document they did not work on, as it could create accountability issues if an error arises.

#### For Support Professionals:

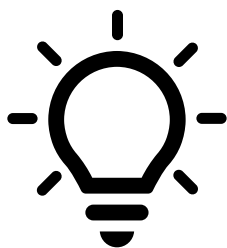
- Deliver dated materials to attorneys as early in the day as possible and provide gentle reminders about pending tasks.
- Be mindful of an attorney's workload and pressures when addressing delays in handling materials.
- Always initial letters and documents you work on, following your firm's guidelines and procedures

### Appreciation and Recognition

#### For Everyone:

- Acknowledge good work with phrases like "great job" or "thank you."
- Recognition fosters a positive and supportive work environment, which benefits the entire team.

By following these guidelines, attorneys and legal support staff can create a professional yet friendly work dynamic that promotes efficiency, mutual respect, and job satisfaction. At AR Legal Solutions, we value these collaboration guidelines in our work as a team and for our clients.



### From the CEO

When I launched AR Legal Solutions, sending out a "Meet the Team" message didn't even cross my mind. But here we are and I'm reminded of what I truly wanted out of being a freelance paralegal. I was excited about the flexibility, the opportunity to build authentic relationships with clients and to help clients find systems that best fit their needs and improve efficiencies in their practices. It's almost hard to believe that all of that has happened – and so much more.

#### Meet the Team

The AR Legal Solutions team expanded rapidly in 2025. We added two paralegals to meet the growing needs of our clients.

**Angela Nijim** is a self-sufficient and motivated patent paralegal with more than 25 years of experience in IP. She is meticulous about the details, tech-savvy, proficient in US patent prosecution, and a master collaborator.

**Elizabeth Peters** has 15 years of experience in intellectual property law, specializing in patent prosecution support. She excels at managing deadlines, ensuring client satisfaction, and consistently brings innovative ideas to benefit both our organization and our clients.

This dynamic team is doing great work for our valued clients.

## Important Deadline

The USPTO is requiring stronger protection for account users. If you are still using text or voice call when verifying your uspto.gov account, you have until **April 30** to switch to a more secure multifactor authentication method.

Your options include:

- Email verification
- An authenticator app, such as Google Authenticator, Authy, Duo Security, Microsoft Authenticator, or Okta Verify
- A security key or biometric authenticator

The reason for this change is that these updated authentication methods are less prone to phishing and social engineering attacks, resulting in stronger protection for your account.

More details are available on the USPTO's [account security information page](#).

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## Patent Center Known Issues and Workarounds

Here is our quarterly update on the needs-improvement when it comes to Patent Center.

**Foreign PCTs not accepted as domestic benefit in WebADS:** Users are unable to enter foreign PCTs as continuity data in the domestic benefit section of the WebADS. Patent Center is investigating the issue as of mid-March. Meanwhile, impacted users are advised to submit a submission using the PTO/AIA/14 form as an alternative.

**Max search limit reached:** An intermittent issue is occurring where users experience a “max search limit reached” error. No workaround at this point, although the Patent Center team says the issue “occurs for a short duration.”

\*Note: If you are not logged in, try logging in to see if that resolves your issue.

**Registered User 401 Error:** Some registered users receive intermittent 401 errors during a filing process. The key settings to check:

- Ensure your browser language is set to English (United States)
- Be sure your local computer time is in sync with official local time
- Contact the EBC for further assistance at [ebc@ustpo.gov](mailto:ebc@ustpo.gov) or 866-217-9197

**Ad-blocking software:** Some ad-blocking software may erroneously block parts of Patent Center. Users should whitelist uspto.gov in ad-blocking software or disable it for best results.

**RESOLVED – Supplemental Exam New Filing: New petitions fee codes unavailable:** Users were finding that the new petition fee codes were unavailable when filing a Supplemental Exam application. Patent Center provided a workaround to pay the new petition fee codes as a follow-on submission.

**RESOLVED – Supplemental Exam Follow-on: New appeal fee codes unavailable:** The new appeal fee code was unavailable when filing a follow-on submission for a Supplemental Examination application. Users could submit a customized fee worksheet as a workaround.

## Time for a Quality Control Check?

We are preaching to the choir here, but patent law is uniquely vulnerable when it comes to making mistakes. Patent attorneys and their support professionals must be extremely detailed and precise because their work involves protecting valuable client assets. Even minor mistakes can have significant legal and financial consequences. AR Legal Solutions offers a unique Quality Control Service for our clients to provide some piece of mind.

- **Reviewing uploads**  
Errors in a patent filing can lead to rejections, loss of rights and even costly legal battles. For example, one common error we find in reviewing new patent applications is that assignees do not match. Our team is able to identify these errors and fix them for our clients. Internally, we require a second eye on all documents and filings.
- **Checking documents and filings for errors**  
Internally at AR Legal Solutions, we require a second eye on all documents and filings. Clients do not always have the staff to hold to this standard, which is where we come in. The client's LAA or paralegal prepares the document/filing, sends it to us, and we conduct the quality check, ensuring the filing is accurate before it goes to the attorney.
- **Review work product of new or current employees**  
New patent support professionals may not know what to look for when it comes to accuracy and may not want to question attorneys. Outsourcing that second check also clears up paralegals' valuable time.

Our Quality Check turnaround is typically 48 hours but we can also accommodate urgent projects. [Contact us](#) to learn more about how we can enhance your quality control process.



### Join the Conversation!

Follow AR Legal Solutions on [LinkedIn](#) where we share periodic pro tips, news from the USPTO and other articles of interest with the goal of creating community and conversation.

*DISCLAIMER: The information provided does not, and is not intended to, constitute legal advice; instead, all information and content are for general informational purposes only. This newsletter contains links to other third-party websites. Such links are only for the convenience of the reader, user, or browser.*

## Office Action SOP: What to Review

When an Office Action is received from the patent office, it's crucial to carefully review several key aspects to determine the appropriate response. A firm should ideally have a set of Standard Operating Procedures (SOPs) and corresponding checklists to ensure Office Actions are reviewed thoroughly, every time. Here are the most important points to review:

1. Identify the type of Office Action and note the response deadline
  - **Non-Final Office Actions** are due three months from the mailing date, with an option of up to three more months of **extensions**.
  - **A Final** Office Action means the examiner is standing firm with why the claims are not allowable. The first opportunity to respond to a Final Office Action is two months from the mailing date, also known as the two-month petition date.
  - Occasionally a **Ex Parte Quayle** action is received. In this case, the examiner has decided that the claims are allowable except for certain formalities and the recipient is given a time period to correct the formalities.
2. Check drawings and cited references
  - On page two of the Office Action, check whether corrected drawings are needed. If the Notice of Cited References box is checked, review the 1449s at the end of the Office Action to determine if any of the references have been crossed out. If so, the references need to be resubmitted. Occasionally, the wrong box (or no box) is checked on page two to indicate if the Office Action is a final or non-final action. Refer to the end of the Office Action as it will be indicated in the examiner's remarks.
3. Ensure the examiner reviewed the correct claims

The examiner will indicate the date of the claims/response being referenced in the Office Action and will also note the claims on page 2. Be sure the dates and claim numbers match the application or any subsequent filings.

After you have given the Office Action a full read-through and checked for the potential errors, a standard next step is to set up the response shell/template. Before the attorney signs the response confirm the following:

- Is an extension of time is required?
- Is an IDS is required?
- Are replacement drawings are needed?
- Are there any other outstanding items that should be filed (examiner interview, etc.)?

A best practice is to provide the full package for the attorney to sign vs. sending things piecemeal.

AR Legal Solutions has developed a comprehensive **Patent Prosecution Standard Operating Procedures (SOP) Manual**. Many firms know the value of SOPs and checklists for ensuring accuracy, consistency and efficiency but lack the time and resources to tackle the project. If you're in that situation, please reach out. Our product is comprehensive, yet easily customizable to accommodate procedures that are specific to your firm.