

Follow-Ups

As you may have noticed, we set reminders to follow-up with clients when we save the EXEC copy of letters. You will get notified for the follow-up if you are listed as staff on the document record. The person who drafted the letter is typically in charge of the follow-up. If you are listed as staff with another assistant or paralegal, check with them to see who should be in charge of it. However, usually it is pretty clear who should be sending it out.

***Note: Follow-ups for Jeff Sheldon are done by Jennifer.** When you get notified for them, email her with the matter no and the type of letter and tell her you are marking the follow-up complete and assuming she is handling. This is the case for all letters EXCEPT registration and patent certificates for Jeff, you do follow-ups for those

1. Find the **original email sent** to the client by searching the matter number in your sent mail
2. **Forward** the email from your personal email
3. Change the subject line to remove the "FW:" and insert **"Awaiting Response Re"**
 - a. If this is not the first follow-up we have sent (shown in the doc record) put "Second/Third Awaiting Response Re:"
4. Select the **appropriate signature block** for the type of letter and copy the same recipients
5. **Save the email to Time Matters**
6. Go back into the document record and **type today's date into the sections for 1st A/R (or 2nd, 3rd etc.)**
7. **Push the date out for the NEXT reminder** under "Followup". This will typically be the same distance out as the original date was from the sent date.
 - a. If this was the 3rd follow-up set the reminder for 1 month before the deadline
8. After 4th notification we typically call the client to double check that they are receiving our emails and clarify their instructions
- 9.
10. If we don't receive clarification we usually send a drop letter

Document Form - Change

File Edit View Process Help

Save & Close Save [Icons] Cancel

Primary Custom Related Notes Documents Phone Email Mail Lexis Billing Outline

Date: 8/12/2019 Mon Time: 5:50pm Code: EXEC/Executed Let

Desc: Letter to Client Regarding Patent Issuance Staff: EMJ/Ella Montouri

Regarding: Hooded Garment (Expedited) 19-38001 Lee, John 18018

File Name: 819-38001\Letter to Client Regarding Patent Issuance.PDF

Reminders: 14 [Follow] [Sent] [Notify] [Hide] [Trigger] [Review] [Billable] [Private] Status: []

Send To: [] From: [] [Msg] [Email] [Alert] [Alarm 60]

Message: 2

3 Drop Ltr: []

Docket? []

Followup: 9/09/2019

4

1st A/R: 8/26/2019

2nd A/R: []

3rd A/R: []

4

Memo Generate Versions (0) Existing New File Clipboard Merge Scan HotDocs

File Information

Date: 8/13/2019

Time: 8:34AM

Size: 672,257

FU Complete Letters (Check the box next to "Follow Up")

- **Confirming Letters**
 - o Letter to Client Confirming of Statement of Use/Amendment to Allege Use Filed
 - o Letter to Client Confirming Extension Request Filed
 - o Letter to Client Confirming Response to Office Action Filed
 - o Letter to Client Confirming Revocation and New Power of Attorney Filed
 - o Letter to Client Confirming Sections 8 & 15 Filed
 - o Letter to Client Confirming Sections 8 & 9 Filed
- **Trademark letters**
 - o Letter to Client Regarding Filing Particulars
 - o Letter to Client Regarding Notice of Acceptance of SOU
 - o Letter to Client Regarding Acceptance of Sections 8 & 15
 - o Letter to Client Regarding Acceptance of Renewal
 - o Letter to Client Enclosing Notice of Abandonment
 - o Letter to Client Regarding Notice of Recordation
 - o Letter to Client Regarding Notice of Publication
 - o Drop Letter to Client
- **Patent Letters**
 - o Letter to Client Regarding Filing Particulars
 - o Letter to Client Regarding Issue Notification
 - o Letter to Client Regarding Notice of Recordation
 - o Letter to Client Enclosing Notice of Abandonment
 - o Letter to Client Regarding Notice of Publication
 - o Drop Letter to Client

Default (2 Weeks) FU Letters (Don't mark anything in EXEC copy)

- Letter to Client Regarding Patent Issuance
- Letter to Client Regarding Trademark Registration

Other: (Manually push out & double check after you save!!)

- Letter to Client Regarding Sections 8 & 15 Due
 - o Push out 3 months
 - o Jeff/K. Bond: 6 months
- Letter to Client Regarding Renewal Due
 - o Push out 3 months
 - o Jeff/K. Bond: 6 months
- Letter to Client Regarding Approval of Extension Request
 - o Push out 2 months
 - o Jeff/K. Bond: 4 months
- Letter to Client Regarding Notice of Allowance
 - o Push out 2 months
 - o Jeff/K. Bond: 4 months

When to Mark Follow-Up Complete

1. If you find you get notified for a letter that didn't need a follow-up
2. If you receive a signed acknowledgement of receipt or signed instructions via email, mail, or fax.

Email Signatures

Approval of Extension Request

This is to follow up with you regarding the email below and the attached letter. As a kind reminder, the deadline to file a Statement of Use or Extension Request for _ is _.

Enclosing Sections 8 & 15 – you can use this for enclosing renewal too

This is to follow up with you regarding the email below and the attached letter. Please note that we are still currently awaiting the executed Sections 8 & 15 (and specimens) for the above-referenced registration. Please execute and date the declaration and return the signed paperwork (along with specimens) to our office at your earliest convenience.

Enclosing SOU

This is to follow up with you regarding the email below and the attached letter. Please note that we are still currently awaiting the executed Statement of Use for the above-referenced application. Please sign and date the Statement of Use and return it to our office at your earliest convenience.

Notice of Allowance

This is to follow up with you regarding the email below and the attached letter. Please note that we are still currently awaiting your instructions regarding the above-referenced application. The deadline to file either a Statement of Use or Extension Request is _. Please let us know how you would like to proceed at your earliest convenience.

Office Action

This is to follow up with you regarding the email below and the attached letter. Please note that we are still currently awaiting your instructions regarding the Office Action for _. If you would like to maintain this application, please forward us your instructions at your earliest convenience and note that the deadline to respond to the Office Action is _.

Registration Certificate

This is to follow up with you regarding the email below and the attached letter. Please note that we are still currently awaiting acknowledgement of receipt for the above-referenced trademark registration certificate. Please sign a copy of the page enclosed, and send or fax it back to our office at your earliest convenience.

Renewal Due – can also be used for Sections 8 & 15

This is to follow up with you regarding the email below and the attached letter. Please note that we are still currently awaiting your instructions regarding the renewal for the above-referenced registration. Please let us know how you would like to proceed at your earliest convenience.

Standard

This is to follow up with you regarding the email below and the attached letter. Please note the _ deadline. We look forward to hearing from you.