**Sending Letters to Clients**

**All Attorneys except Dan/Don**

1. After receiving approval from the attorney, open CORO version.

2. Check dates and any other possible formatting errors.

3. Add attorney e-signature

4. File -> save as Adobe PDF -> Desktop

5. Check Enclosures in TM or email chain and drag and drop them into the PDF letter

6. Save PDF letter to TM

a. **Code**: EXEC (for “Executed Copy”)

b. **Desc**: Same as Coro (paste CORO name)

c. **Staff**: You + Attorney (if Jeff’s letter then you + Jennifer)

i. This is who will get the follow-up so if you’re sending for someone else put you+them+attorney

d. **Follow-Up**: Adjust as necessary (please refer to Follow-Up cheat sheet)

e. **Save and close**

7. Save JPEG/TIFF image of the first page of your letter .

***If the letter is only two pages please include both pages. If the letter is more than two pages only include the first page.***

 a. Shift + select first page in PDF (if letter only two pages then select both.

b. Right click -> extract page (s)

c. File -> Save As -> Image (JPEG)/(TIFF) -> Save to Desktop

d. Close out of extracted pages

8. Click on the envelope in Reader and attach to email

**From:** your email

**To:** copy from CORO

**CC:** copy from CORO (if applicable); the attorney you are sending on behalf of (If Jeff, cc

Jennifer and if Peter, bcc Desiree)

**Subj:** Copy Re Line from CORO

\*if the mark is an image copy the matter reference\*

**Body:** Insert “Other Attorney” signature block

• Edit “Dear “ and attorney name

**Insert JPEG/TIFF:** Insert -> Picture -> Select from Desktop

9. **DOUBLE CHECK EVERYTHING**

10. Send

11. Save the email to Time Matters

**Sending Dan/Don Letters to Clients**

1. After receiving approval from the Don, open CORO version.

2. Check dates and any other possible formatting errors.

3. Add D.M. Cislo Esq. E-signature.

 ***Don’t use Don signature. (Exceptions being if the letter is sent from Don specifically)***

4. File -> save as Adobe PDF -> Desktop

5. Check Enclosures in TM or email chain and drag and drop them into the PDF letter

6. Save PDF letter to TM

a. **Code**: EXEC (for “Executed Copy”)

b. **Desc**: Same as Coro (paste CORO name)

c. **Staff**: You + QCC

i. This is who will get the follow-up so if you’re sending for someone else put you+them+attorney

d. **Follow-Up**: Adjust as necessary (please refer to Follow-Up cheat sheet)

e. **Save and close**

7. Save JPEG/TIFF image of the first page of your letter .

***If the letter is only two pages please include both pages. If the letter is more than two pages only include the first page.***

 a. Shift + select first page in PDF (if letter only two pages then select both.

b. Right click -> extract page (s)

c. File -> Save As -> Image (JPEG)/(TIFF) -> Save to Desktop

d. Close out of extracted pages

8. Click on the envelope in Reader and attach to email

**From:** your Dan email

**To:** copy from CORO

**CC:** copy from CORO (if applicable); for patent letters cc the QCC attorney; do not cc Ashling unless relevant – use discretion (ex. If Dan has an upcoming meeting w/client and letter Is important to the topic of the meeting)

**Subj:** Copy Re Line from CORO

\*if the mark is an image copy the matter reference\*

**Body:** Insert “Dan’s Signature” signature block.

***Don’t use Don signature. (Exceptions being if the letter is sent from Don specifically)***

• Edit “Dear “

**Insert JPEG/TIFF (s):** Insert -> Picture -> Select from Desktop

9. **DOUBLE CHECK EVERYTHING**

10. Send

11. Save the email to Time Matters

**Follow-Ups**

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

Confirming Letters

* Letter to Client Confirming of Statement of Use/Amendment to Allege Use Filed
* Letter to Client Confirming Extension Request Filed
* Letter to Client Confirming Response to Office Action Filed
* Letter to Client Confirming Revocation and New Power of Attorney Filed
* Letter to Client Confirming Sections 8 & 15 Filed
* Letter to Client Confirming Sections 8 & 9 Filed

Trademark letters

* Letter to Client Regarding Filing Particulars
* Letter to Client Regarding Notice of Acceptance of SOU
* Letter to Client Regarding Acceptance of Sections 8 & 15
* Letter to Client Regarding Acceptance of Renewal
* Letter to Client Enclosing Notice of Abandonment
* Letter to Client Regarding Notice of Recordation
* Letter to Client Regarding Notice of Publication
* Drop Letter to Client

Patent Letters

* Letter to Client Regarding Filing Particulars
* Letter to Client Regarding Issue Notification
* Letter to Client Regarding Notice of Recordation
* Letter to Client Enclosing Notice of Abandonment o Letter to Client Regarding Notice of Publication
* Drop Letter to Client

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

* Letter to Client Regarding Patent Issuance

Other :( Manually push out in order to ensure that 3 ARs (minimum) are sent before the deadline & double check after you save)

* Letter to Client Regarding Sections 8 & 15 Due
* Letter to Client Regarding Approval of Extension Request
* Letter to Client Regarding Notice of Allowance (Both Patent and Trademark)
* Letter to Client Regarding Approval of Extension Request
* Letter to Client Regarding Office Action
* Letter to Client Regarding Scan/Search
* Letter to Client Regarding New Trademark Application

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 have send the letter on behalf of an attorney that is not Dan check with them before sending the awaiting response as they might already be in contact with the client. 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. If you have send the letter

**\*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

\* Before sending an AR and following the instructions below check the “Note” section in TM or the emails to verify that we have not received instructions from the client.

1. Find the original email sent to the client by searching the matter number in your sent mail
2. Reply all 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:"

1. Select the appropriate signature block from the follow up signatures for the type of letter and copy the same recipients.
2. Save the email to Time Matters
3. Go back into the document record and type today's date into the sections for 1st A/R (or 2"d,3rd etc.)
4. 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.
5. lf this was the 3'd follow-up set the reminder for 1month before the deadline
6. After 4th notification we typically call the client to double check that they are receiving our emails and clarify their instructions. After the call please add “Note” in TM detailing the details of the call.
7. If we don't receive clarification we usually send a drop letter

**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 and action has been taken on these instructions.

**Email Signatures:**

**Approval of Extension Request:**

Dear:

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 \_\_. Please let us know how you would like to proceed at your earliest convenience. Thank you.

**Enclosing Sections 8 & 15:**

Dear :

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:**

Dear :

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:**

Dear :

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:**

Dear :

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 \_.

**Renewal Due:**

Dear :

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. Thank you.

**Scan Results or Full Search:**

Dear :

This is to follow up with you regarding the attached letter. Please note that we are still currently awaiting your instructions regarding the above-referenced preliminary trademark scan. Please let us know how you wish to proceed at your earliest convenience.

We look forward to hearing from you in due course.

**Standard:**

Dear :

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.

**Trademark Application:**

Dear :

This is to follow up with you regarding the email below and the attached letter. Please note we are still awaiting the signed application. If you are still interested in the matter and would like to proceed, please forward us the signed documents at your earliest convenience. Thank you.

**Notice of Allowance (Patent):**

Dear:

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 submit the issue fees (and corrected drawings) is **\_\_\_\_\_**. Please let us know how you would like to proceed at your earliest convenience. Thank you.