

Business Methods Customer Partnership Meeting

Opening Remarks

1:00 p.m. – 1:15 p.m.

September 20, 2017

Andrew Hirshfeld ***Commissioner for Patents, USPTO***

Andrew (Drew) Hirshfeld is Commissioner for Patents for the U.S. Patent and Trademark Office. He was appointed to this position in July 2015.

As Commissioner for Patents, Mr. Hirshfeld manages and leads the patent organization as its chief operating officer. He is responsible for managing and directing all aspects of this organization which affect administration of patent operations, examination policy, patent quality management, international patent cooperation, resources and planning, and budget administration.

In his previous role as Deputy Commissioner for Patent Examination Policy, Mr. Hirshfeld served as an authority on patent laws, rules, and examining practice and procedure, and provided administrative oversight and direction for the activities of the Office of Petitions, Office of Patent Legal Administration, and the Office of the Manual of Patent Examining Procedure. Further, Mr. Hirshfeld established patent examination and documentation policy standards for the Commissioner for Patents.

Prior to serving as Deputy Commissioner for Patent Examination Policy, Mr. Hirshfeld was the Chief of Staff to the Under Secretary of Commerce for Intellectual Property and Director of the USPTO. Mr. Hirshfeld began his career at the USPTO in 1994 as a Patent Examiner. He became a Supervisory Patent Examiner in 2001, and was promoted to the Senior Executive Service in 2008 as a Group Director in Technology Center 2100, Computer Architecture and Software.

Mr. Hirshfeld received a Bachelor of Science from the University of Vermont, and a J.D. from Western New England College School of Law.

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Director's Update

1:15 p.m. – 1:45 p.m.

September 20, 2017

Tariq Hafiz

Director, Technology Center 3600, USPTO

Tariq Hafiz joined the USPTO in 1992 as a patent examiner and in 2016 became a Director for Technology Center 3600 specializing in Business Methods. He first became a Director in Technology Center 2600 specializing in communications. Prior to becoming a Director, Tariq served as a Supervisory Patent Examiner in Business Methods where he managed the examination of applications in the operations research technologies.

At the USPTO, he has led efforts to revamp the initial After Final Consideration Pilot to increase collaboration between the examiner and applicant. He is also a lead for examiner interview practice, which provides training to examiners as well as increases communication between the examiner and applicant. Prior to the USPTO, he worked in software development at the Computer Sciences Corporation for over three years. Mr. Hafiz earned a bachelor's degree in physics from the College of William and Mary with graduate work in electrical engineering from Virginia Tech.

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Business Methods Website Demo

1:45 p.m. – 2:00 p.m.

September 20, 2017

Jamisue Plucinski

Technology Quality Assurance Specialist, Technology Center 3600, USPTO

Jamisue Plucinski is a Technology Quality Assurance Specialist for Technology Center 3600. Prior to her role as a TQAS she served as a Supervisory Patent Examiner in Business Methods in both the Advertising Art as well as the Miscellaneous Art.

Ms. Plucinski started her career at the USPTO in October 2000 as an examiner in Technology Center 3700, working on applications in the area of absorbent articles. In January of 2004, she moved to Technology Center 3600 and became an examiner in Business Methods in the miscellaneous art. She examined applications in area of safety and security, building evacuation and business certification. As an Examiner she worked on a detail with the Business Method Practice Specialist. As a Supervisor she worked on a detail as a Trainer at the Patent Training Academy.

Prior to joining the Patent Office she worked as a Natural Gas Analyst for SAIC and worked with the US Department of Energy.

Ms. Plucinski received a Bachelor of Science in Engineering in Chemical Engineering from The University of Iowa.

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March 15, 2018

Namrata (Pinky) Boveja (Moderator)

Supervisory Patent Examiner, Technology Center 3600, USPTO

Namrata (Pinky) Boveja is currently serving as a Supervisory Patent Examiner (SPE) for Art Unit 3696 focused on examining Insurance, Finance, and Banking related patent applications in the Business Methods section of Technology Center 3600 at the United States Patent and Trademark Office (USPTO). Prior to this, she served as the Acting Deputy Director in the Office of Petitions and as a SPE for Art Unit 3682 focused on examining Incentive Programs, Coupons, and Advertising related patent applications. She began her career at the USPTO in 2005 as a Patent Examiner in the Incentive Programs, Coupons, and Advertising area, became a Primary Patent Examiner in 2009, and was promoted to become a SPE in the same area in 2011. As a supervisor, she has led several projects in the Technology Center including the White House Initiative Glossary Pilot and the Business Methods External Website Development Project. Additionally, she served as an instructor for numerous topics concerning patent examination at the USPTO. Ms. Boveja served as the first Vice President of the Women in Science and Engineering affinity group. She also served as an Appeals Specialist at the Patent Trial and Appeal Board assisting Administrative Patent Judges in drafting written opinions on appeals. She received the Department of Commerce Bronze Medal for patent examination and supervisory accomplishments, a Career Achievement Award, and Leadership in Action Awards. Ms. Boveja is also a senior fellow of the year-long Partnership for Public Service's Excellence in Government Fellows Program.

During law school, Ms. Boveja served as a Legislative Analyst for the Council of District of Columbia's Economic Development Committee. Prior to joining the USPTO, Ms. Boveja participated in the two-year Technical Sales Leadership Program with General Electric Consumer & Industrial where she worked as a Technical Sales Engineer. She also worked as a Financial Management Consultant for International Business Machines. Ms. Boveja is a licensed attorney in Maryland and the District of Columbia (inactive). She has a BS in Mechanical Engineering and received her MBA from the University of Maryland College Park. Additionally, she received her JD from the University of District of Columbia.

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Suggestions to Overcome 101

2:30 p.m. – 3:15 p.m.

September 20, 2017

Charles Bieneman

Member, Bejin Bieneman PLC

Charles Bieneman is a member of the firm. Charlie's practice focuses on patent prosecution, counseling, and opinions for clients in a variety of industries, including automotive, telecommunications, and aerospace.

Prior to forming Bejin Bieneman, Charlie was a partner in a Michigan intellectual property firm. Previously, he was a patent examiner with the U.S. Patent and Trademark office, where he examined claim inventions in the areas of computer software, databases, and the World Wide Web. He also held management positions with two computer software companies and has significant real world experience as a software developer, consultant, and project manager. Charlie also gained experience as an attorney with the U.S. Securities and Exchange Commission and the Washington, D.C. office of a national law firm.

Charlie is a graduate of University of Michigan Law School (J.D., *cum laude*, 1992) where he was a Note Editor on the Michigan Law Review, 1991-1992, and is the author of "Note, Legal Interpretation and a Constitutional Case: Home Building & Loan Association v. Blaisdell," 90 Mich. L. Rev. 2534 (1990). He is also a graduate of University of Maryland (B.S., Computer Science, 1999) and St. John's College in Santa Fe (B.A., 1989).

Business Methods Customer Partnership Meeting

Panel Discussion: The Examination Process

3:15 p.m. – 4:00 p.m.

September 20, 2017

Synopsis

This panel discussion will address issues relating to the examination process, including the Patent Examiner Count System and the Patent Examiner Docket Management System, and how Practitioners and Examiners can work together emphasizing a complete and thorough examination along with a compact resolution of issues.

Panel Members

Kirupa Pushparaj (Moderator)
Chief IP Counsel, Square, Inc.

Jessica Rossi
Management Quality Assurance Specialist, Office of Patent Training, USPTO

Victoria Shumate
Supervisory Patent Examiner, Technology Center 3600, USPTO

Peter Ludwig
Primary Patent Examiner, Technology Center 3600, USPTO

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Panel Discussion: The Examination Process

3:15 p.m. – 4:00 p.m.

September 20, 2017

Kirupa Pushparaj

Head IP Counsel, Square, Inc.

Kirupa Pushparaj is head IP counsel at Square, Inc., where he helps build Square's patent and trademark portfolios, and also manages various IP litigation, copyright, domain, and trade secret issues. Before working at Square, Kirupa was patent counsel for Lab126, the digital products arm of Amazon.com, and also practiced intellectual property law at Perkins Cole LLP prior to that. Before starting his practice of law, Kirupa was a senior design engineer at Intel Corp., working on circuit design and semiconductor process technology.

UNITED STATES
PATENT AND TRADEMARK OFFICE



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Panel Discussion: The Examination Process

3:15 p.m. – 4:00 p.m.

September 20, 2017

Jessica Rossi

Management Quality Assurance Specialist, Office of Patent Training, USPTO

Jessica Rossi received a Bachelor's degree in Chemical Engineering from the University of Virginia. She began her career as a Patent Examiner at the USPTO in 1999 examining applications in the area of adhesive bonding and miscellaneous chemical manufacture. In 2007, she accepted a temporary position as a Supervisory Patent Examiner Trainer in the Office of Patent Training and trained new examiners in various fields of Chemistry and Chemical Engineering. In 2008, she returned to TC 1700 as a Supervisory Patent Examiner and supervised Examiners reviewing applications in the fields of metal bonding and metal casting. In 2012, she accepted a temporary position as a Class Manager in the Office of Patent Training. Over a period of 2 years, she was the first line Supervisor for roughly 60 Trainers and the second line supervisor for roughly 280 Examiners representing various fields within the Chemical, Electrical, and Mechanical disciplines.

In 2014, she accepted her current position as Management Quality Assurance Specialist in the Office of Patent Training. As an MQAS, she evaluates quality, identifies concerns, and takes the necessary actions to address these concerns in the Examining Corps. She also serves as a Docket Management POC and trains Examiners and Managers on the Docket Management system.

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Panel Discussion: The Examination Process

3:15 p.m. – 4:00 p.m.

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Victoria P. Shumate

Supervisory Patent Examiner, Technology Center 3600, USPTO

Victoria Shumate is a Supervisory Patent Examiner at the Elijah J. McCoy Midwest Regional Office in Detroit, Michigan. Prior to her role in Technology Center 3600, she served as a Resource Supervisory Patent Examiner at the Midwest Regional Office. In this role, she focused on assisting examiners in Technology Center 3700 and on outreach to the Greater Detroit community of stakeholders.

Ms. Shumate began her career at the USPTO in July 2007 as an examiner in Technology Center 3700, specifically addressing applications in the area of Medical Devices including catheters, syringes, insulin pumps, and related technologies. She has served as a Quality Nominee on the Cooperative Patent Classification System transition and as a Training Assistant with the first Entry Level Patent Training Academy class in Detroit.

Ms. Shumate received a Bachelor of Science in Engineering in Biomedical Engineering and a Master of Science in Engineering in Biomedical Engineering from The University of Michigan, Ann Arbor.

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Panel Discussion: The Examination Process

3:15 p.m. – 4:00 p.m.

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Peter L. Ludwig

Primary Patent Examiner, Technology Center 3600, USPTO

Peter Ludwig is a Primary Patent Examiner in Art Unit 3687. Peter is currently serving a detail position as a Technology Center 3600 Trainer. In this role, he focuses on assisting business method examiners in all aspects of examination from search help to subject matter eligibility determinations.

Prior to this role, Mr. Ludwig served two details as a Patent Appeal Specialist at the Patent Trial and Appeal Board (PTAB). In this position, Peter worked directly with the administrative law judges and assisted them in analyzing the facts and drafting opinions in *ex parte* and *inter partes* reviews.

Peter began his career at the USPTO in 2006. He examines applications in the area of Business Methods including point of sale terminals, inventory management, e-commerce, and operations research.

Mr. Ludwig received a Bachelor of Science in Engineering and Management with a focus on electrical engineering and a Juris Doctorate from Franklin Pierce Law Center in Concord, New Hampshire.

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Referenced Links

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Patent Examiner Technical Training Program (PETTP)

<https://www.uspto.gov/PatentExaminerTechTraining>



Business Methods Website

<https://www.uspto.gov/BusinessMethods>



Video Conferencing and Collaboration

http://www.uspto.gov/patents/resources/web_conferencing.jsp



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Referenced Links

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Examiner Training Materials

<https://www.uspto.gov/learning-and-resources/examiner-training-materials>



Examiner Guidance and Training Materials

<https://www.uspto.gov/patent/laws-and-regulations/examination-policy/examination-guidance-and-training-materials>



Patent Examiner Count System

<https://www.uspto.gov/patent/initiatives/patent-examiner-count-system>

