

Financial Profile User's Guide

Version 1.0



United States Patent and Trademark Office
Office of the Chief Financial Officer
Office of Finance – Receipts Accounting Division

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Overview

The Financial Profile (FP) system provides a secure, fast, and convenient method to access payment history information anytime over the United States Patent and Trademark Office (USPTO) Web site. The FP system helps with reconciling your payment activities by providing detailed transaction information and reports for all fees paid to the USPTO.

As a FP user, you are able to:

- Create, activate, and maintain your unique FP account via a self-service registration process;
- Add multiple payment types used at the USPTO to your FP account (e.g., credit card accounts, USPTO deposit accounts, and USPTO EFT accounts);
- View/print detailed transaction information (e.g., patent/application number, attorney docket number, payment amount, fee code, and fee code description);
- View/print/download (PDF and CSV files) monthly statements for each payment type registered;
- Search for specific transactions by attorney docket number (i.e., client matter number), application number, transaction type (e.g., sale or refund), and/or payment amount; and
- Replenish deposit accounts by EFT, transfer funds between existing deposit accounts, and select an option to stop receiving paper deposit account statements by mail (*deposit account holders only*).

Note: After adding a USPTO EFT account(s) to your FP, information for both EFT and paper check payments will be available since transactions processed are based on your banking information.

The FP system is available at <https://ramps.uspto.gov/ramfp/welcome.html>.

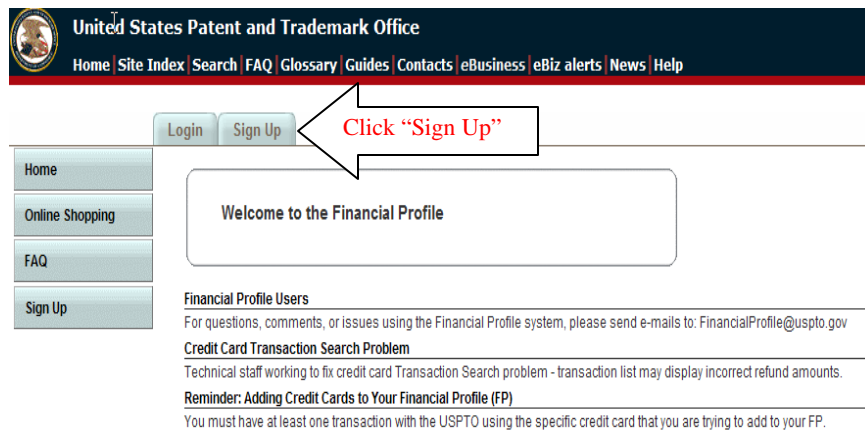
If you have any questions or issues with the FP system, please send an e-mail to FinancialProfile@uspto.gov for assistance.

Section 1 – Establish a Financial Profile Account

Each user should establish a separate Financial Profile (FP) account. There are two types of FP accounts, which are “Report Only” and “Standard”. Once the FP account has been established, the profile type cannot be changed.

The “Report Only” allows adding up to 50 payment account types. The “Standard” allows only adding up to 5 payment account types, but also allows the user to replenish deposit accounts via electronic funds transfer (EFT) and to transfer funds between existing USPTO deposit accounts.

Step 1 of 6 – Click on the “Sign Up” tab (see screen shot below).



Step 2 of 6 – Enter the required information, select the “Profile Type”, and click “Next” (see screen shot below).

Please create a User ID, a Password and enter your user information in the form below.
All items denoted by * are required.

User ID *
(must be 8-32 characters with no spaces; not case-sensitive)

Password *
(must be 8 to 32 characters with no spaces; case-sensitive)

Re-enter Password *

First Name *

Last Name *

Company or Organization Name

E-Mail Address *

Re-enter E-Mail Address *

Phone Number *
(XXX)XXX-XXXX

Profile Type

Standard Profile Report Only Profile

Standard Profile
Standard Profiles may have up to 5 payment account types, view and download reports and make payments.

Report Only Profile
Report only profiles may have numerous payment account types and view and download reports only.

Step 3 of 6 – Enter your mailing address information, and click “Next” (see screen shot below).

Mailing Address
All items denoted by * are required.

Country *
UNITED STATES

Name *
[]

Attention
[]

Street 1 *
[]

Street 2
[]

City *
[]

State * **Zip ***
[] []

< Previous Next >

Step 4 of 6 – Click on the “Notifications” box to receive notifications by e-mail. Read the User Agreement and select “I Agree”, and click “Next” (see screen shot below).

Notifications
 Receive USPTO General Correspondence

User Agreement: [Click here to open the User Agreement in another window](#)

USPTO Privacy Policy

Our privacy policy is simple: we collect no personal information about you when you visit our Web site unless you choose to provide that information to us. Submitting personal information is voluntary. When you voluntarily submit information, it constitutes your consent to the use of the information for the purpose(s) stated at the time of collection. See the Privacy Act of 1974 (P.L. 93-579) for more information on your rights under the Privacy Act.

Information Collected and Stored Automatically

The USPTO Web server collects and saves only the default information

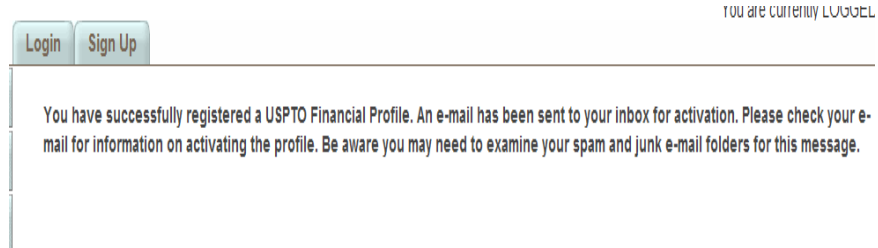
Agreement
 I Agree

< Previous Next >

Click here to receive notifications

Click “I Agree” to accept User Agreement

Step 5 of 6 – The next screen displays a summary of the information that was entered. Verify the information is accurate, and click “Submit”. You will then receive a message that your FP account was successfully registered (*see screen shot below*).



Step 6 of 6 – The message below is sent to the e-mail address that was provided in Step 2. (Note: You may need to check your spam or junk e-mail folder.) Click on the link to activate your FP account.

Your USPTO Financial Profile has been registered successfully. You must click the below link to activate your profile before attempting to login.

<https://ramps.uspto.gov/ramfp/activation.html?userName=dGhvb3BldGwZGU=>

Click here to activate

If you have difficulty activating your profile, you should copy and paste the entire link above into your browser. Note: you may need to disable word wrap.

If you need further assistance, please send an e-mail to FinancialProfile@uspto.gov and include the User ID for the account you wish to activate. Never include your password in any correspondence relating to your Financial Profile.

You will receive a confirmation that your account has been activated successfully (*see screen shot below*).



Your Account has been activated successfully. Please login to access your profile.

Section 2 – My Accounts

The “My Accounts” tab allows users to add credit cards, deposit accounts, or EFT accounts to their FP account. In addition, users can edit or remove accounts, replenish deposit accounts, transfer funds between two deposit accounts, and view and download statements for each of their associated accounts as a PDF or CSV file.

Add an Account

Step 1 of 2 – Click the drop down box to select the account type, and click “Add Account” (see screen shot below).

The screenshot shows the 'My Accounts' section of a web application. At the top, there are navigation tabs: 'My Accounts', 'Transaction Search', 'My Profile', and 'Logout'. On the left, there is a sidebar with 'Home', 'Online Shopping', and 'FAQ'. The main content area is titled 'My Accounts:' and contains a form with a dropdown menu labeled 'Select Account Type' and an 'Add Account' button. The dropdown menu is open, showing three options: 'Credit Card', 'Deposit Account', and 'Electronic Funds Transfer'. A red arrow points to the dropdown menu with the text 'First click here to select the account type'. Another red arrow points to the 'Add Account' button with the text 'Then click here to add the account'. Below the dropdown menu, there is a text input field and a 'Next' button. The text below the input field reads: 'No accounts have been added to this profile.'

Step 2 of 2 – Enter the required information for each account type, and click “Next” (see screen shot below, which shows an example for Credit Card).

The screenshot shows the 'Add Credit Card' form. At the top, there are navigation tabs: 'My Accounts', 'Transaction Search', 'My Profile', and 'Logout'. On the left, there is a sidebar with 'Home', 'Online Shopping', and 'FAQ'. The main content area is titled 'Add Credit Card' and contains a form with a dropdown menu labeled 'Type', an 'Account Number' field, and a 'Card Holder Name' field. The 'Type' dropdown menu is open, showing the option 'Select'. Below the 'Account Number' field, there is a text input field. Below the 'Card Holder Name' field, there is a text input field. At the bottom of the form, there are two buttons: 'Next >' and 'Cancel'. Above the form, there is a disclaimer: 'Approved for use through 12/31/2011. OMB 0651-0043 U. S. Patent and Trademark Office; U.S. DEPARTMENT OF COMMERCE Under the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it displays a valid OMB control number.'

Once an account is added to a FP, users have the following options (you will see the “Replenish” and “Transfer Funds” options only if the requirements are met):

Account Options Description

Edit – make changes to this account in your Financial Profile only (nick name, address, etc.).

Remove – remove the account from your Financial Profile only.

Replenish – add funds to the Deposit Account from an Electronic Funds Transfer (EFT) account (requires at least one Deposit Account and one EFT account on your Financial Profile).

Transfer Funds – move funds between two Deposit Accounts (requires at least two Deposit Accounts on your Financial Profile)

Below are helpful tips for adding accounts to your FP.

Credit Card: The credit card must first have been used to pay a fee at the USPTO. In addition, the cardholder name must be entered exactly as it appears on the card.

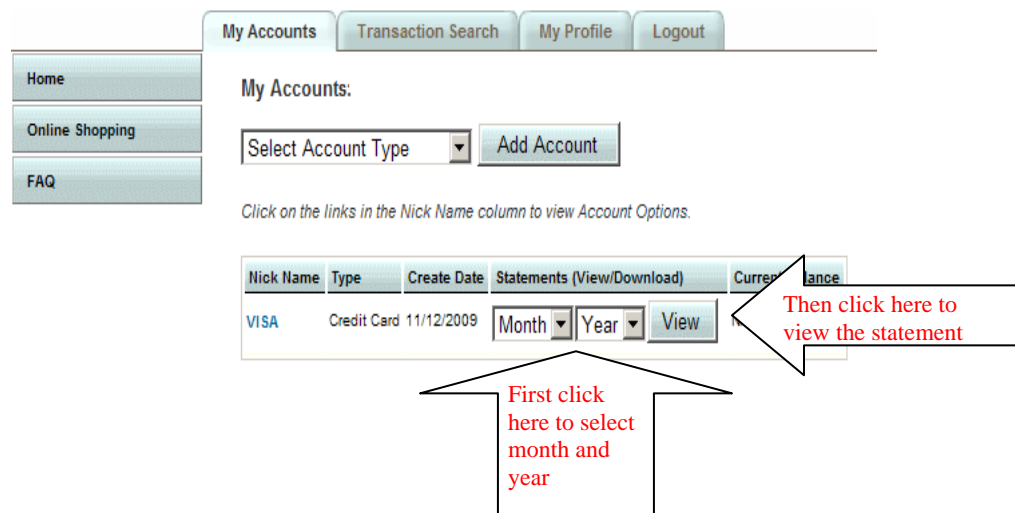
Deposit Account: You will need at least the deposit account number and the access code, and must be an authorized user of the deposit account.

Electronic Funds Transfer (EFT): You will need the EFT account user ID and password. An EFT account cannot be established using the FP system, but must be set up on the USPTO Web site at <https://ramps.uspto.gov/eram/>. It takes up to 7-8 business days for an EFT account to become active.

View and Download Statements

Monthly statements can be viewed for any of the accounts associated with your FP account. The statements can also be downloaded as a PDF or CSV file.

Step 1 of 2 – Select the “Month” and “Year” for the account that you would like, and click “View” (see screen shot below).



Step 2 of 2 – The monthly statement will appear on the screen (see screen shot below). Download the statement by clicking the “PDF” or “CSV” links at the bottom right corner of the screen.


The “Download Statement” provides the same information appearing on the screen, and the “Download Statement Details” contains more detailed information.

My Accounts Transaction Search My Profile Logout						
Home	Credit Card Statement for - VISA For 10/2009					
Online Shopping						
FAQ						
Type	Transaction Status	Date Posted	Name/Number	Attorney Docket Number	Charges/ Credits (-)	Charge Date
Sale	Active	10/27/2009	1253917		\$527.00	10/26/2009
Sale	Active	10/27/2009	6123	GDP	\$270.00	10/26/2009
Sale	Active	10/27/2009	6123474		\$270.00	10/27/2009
Sale	Active	10/27/2009	119260	TEG	\$180.00	10/27/2009
Sale	Active	10/27/2009	11926	TEG	\$180.00	10/27/2009
Sale	Active	10/28/2009	1192597	OMN	\$555.00	10/27/2009
Sale	Active	10/28/2009	1192597	OMN	\$555.00	10/27/2009
Sale	Active	10/28/2009	119259	OMN	\$555.00	10/27/2009
Sale	Active	10/28/2009	10523	ELEI	\$810.00	10/27/2009
Sale	Active	10/28/2009	119259	OMN	\$555.00	10/27/2009
Sale	Active	10/29/2009	63117		\$1,305.00	10/28/2009
Sale	Active	10/29/2009	1192444	TRP	\$180.00	10/29/2009
Sale	Active	10/30/2009	118779		\$245.00	10/29/2009

(*) in the type column indicates that a single payment paid for multiple items or multiple payments paid for a single item.
Note: An Adjustment indicates that a sale was reversed, not that payments were refunded.

Download Statement to [PDF](#) | [CSV](#)
Download Statement Details to [PDF](#) | [CSV](#)

The PDF version of the “Download Statement” appears below.

 United States Patent and Trademark Office <small>Date Printed: 01-29-2010 10:33:34 EST</small>						
Credit Card Statement for - Account#: ***** (10/2009)						
Type	Transaction Status	Date Posted	Name / Number	Attorney Docket Number	Charges/Credits (-)	Charge Date
Sale	Active	10/27/2009	125		\$527.00	10/26/2009
Sale	Active	10/27/2009	61	GC	\$270.00	10/26/2009
Sale	Active	10/27/2009	61		\$270.00	10/27/2009
Sale	Active	10/27/2009	11	TEC	\$180.00	10/27/2009
Sale	Active	10/27/2009	11		\$180.00	10/27/2009
Sale	Active	10/28/2009	11	OMN	\$555.00	10/27/2009
Sale	Active	10/28/2009	11		\$555.00	10/27/2009
Sale	Active	10/28/2009	11	OMN	\$555.00	10/27/2009
Sale	Active	10/28/2009	10	ELEC	\$610.00	10/27/2009
Sale	Active	10/28/2009	11	OMN	\$555.00	10/27/2009
Sale	Active	10/29/2009	63	ENC	\$1,305.00	10/28/2009
Sale	Active	10/29/2009	11	TRF	\$180.00	10/29/2009
Sale	Active	10/30/2009	11		\$245.00	10/29/2009

(*) indicates that a single payment paid for multiple items or multiple payments paid for a single item.
Note: Adjustments indicate that a sale was reversed, not that payments were refunded.

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The PDF version of the "Download Statement Details" appears below.

United States Patent and Trademark Office
Date Printed: 01-26-2010 10:38:28 EST

Credit Card Statement for - Account#: *** (10/2009)**

Type	Date	Name/Number	12T
Transaction Status	Active	Attorney Docket Number	
Date Posted	10/27/2009		

Sale Details

Name/Number	Attorney Docket Number	Transaction Status	Quantity	Item Total	Payment Amount	Fee Code	Description
1C		Active	1	\$82.00	\$82.00	4011	BASIC FILING FEE - ORIGINAL UTILITY APPL- ELECTRONIC FILING
1C		Active	1	\$270.00	\$270.00	2111	SEARCH OF ORIGINAL PATENT APPLICATION- SMALL ENTITY
1C		Active	1	\$110.00	\$110.00	2311	EXAMINATION OF ORIGINAL PATENT APPLICATION
1C		Active	1	\$65.00	\$65.00	2051	SURCHARGE- LATE FILING FEE, SEARCH FEE, EXAMINATION FEE OR OATH OR DECLARATION- SMALL ENTITY

Payment Details

Payment Type	Total Payment Amount	Payment Date	Payment Amount (this sale)
Credit Card	\$527.00	10/27/2009	\$527.00

Type	Date	Name/Number	F
Transaction Status	Active	Attorney Docket Number	GI
Date Posted	10/27/2009		

Sale Details

Name/Number	Attorney Docket Number	Transaction Status	Quantity	Item Total	Payment Amount	Fee Code	Description
E	GDF	Active	1	\$220.00	\$220.00	1005	PROVISIONAL APPLICATION FILING FEE
E	GDF	Active	1	\$50.00	\$50.00	1052	SURCHARGE- LATE PROV. FILING FEE OR COVER SHEET

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Section 3 – Transaction Search

The "Transaction Search" tab allows users to search for specific transactions over a given period of time.

Step 1 of 4 – Select the account to query by clicking on the drop down box (see screen shot below).

My Accounts **Transaction Search** My Profile Logout

Home

Online Shopping

FAQ

Transaction Search

To ensure faster response times please provide as much information as possible. Including specific date ranges or specific Attorney Docket Numbers or Name/Numbers can greatly speed the search. (Name/Number is the USPTO supplied identifier, such as a Patent Number, Trademark Registration Number, etc).

All items denoted by * are required.

Select Account All Accounts ▼

From Accounting Date VISA (MM/DD/YYYY)

To Accounting Date* (MM/DD/YYYY)

Transaction Type All ▼

Name/Number

Attorney Docket Number (Begins with)

Payment Amount

Submit Cancel

Click here to select the account

Step 2 of 4 – Enter the “From Accounting Date” and “To Accounting Date” to search between a range of days or several months (see screen shot below).

The screenshot shows the 'Transaction Search' form. A callout box on the left says 'Enter the dates, or select the dates using the drop down calendar'. The 'From Accounting Date' is set to 08/01/2009. The 'To Accounting Date' field is empty, and a calendar pop-up is open, showing the month of November 2009. The calendar has the 13th selected. The 'Transaction Type' is set to 'All'. Other fields include 'Select Account' (VISA), 'Name/Number', 'Attorney Docket Number', and 'Payment Amount'. There are 'Submit' and 'Cancel' buttons at the bottom.

Step 3 of 4 – Select the “Transaction Type” that you would like to query. You can search all or only a specific type of transaction (see screen shot below).

The screenshot shows the 'Transaction Search' form with the 'Transaction Type' dropdown menu open. A callout box on the right says 'Click here to select the “Transaction Type”'. The dropdown menu lists 'All', 'Adjustments', 'Refunds', 'Replenishments', and 'Sales'. The 'From Accounting Date' is 08/01/2009 and the 'To Accounting Date' is 11/12/2009. Other fields are the same as in the previous screenshot.

Step 4 of 4 – Enter a value in the “Name/Number”, “Attorney Docket Number”, and/or “Payment Amount” fields (see screen shot below). Click “Submit” to view the report.

The screenshot shows the 'Transaction Search' form. It includes a navigation menu with 'Home', 'Online Shopping', and 'FAQ'. The form title is 'Transaction Search' with a sub-header 'Transaction Search'. Below the title is a note: 'To ensure faster response times please provide as much information as possible. Including specific date ranges or specific Attorney Docket Numbers or Name/Numbers can greatly speed the search. (Name/Number is the USPTO supplied identifier, such as a Patent Number, Trademark Registration Number, etc).' A note states 'All items denoted by * are required.' The form fields are: 'Select Account' (VISA), 'From Accounting Date*' (08/01/2009), 'To Accounting Date*' (11/12/2009), 'Transaction Type' (Sales), 'Name/Number' (empty), 'Attorney Docket Number' (empty), and 'Payment Amount' (555.00). There are 'Submit' and 'Cancel' buttons. Two red arrows point to the 'Name/Number', 'Attorney Docket Number', and 'Payment Amount' fields with the text 'First enter a value in one of these fields'. Another red arrow points to the 'Submit' button with the text 'Then click "Submit"'.

The report showing the transaction list appears on the screen. Download the report by clicking the “PDF” or “CSV” links at the bottom right corner of the screen.

The screenshot shows the 'Transaction List' report. It includes a navigation menu with 'My Accounts', 'Transaction Search', 'My Profile', and 'Logout'. The report title is 'Transaction List'. Below the title is a table with the following columns: Type, Transaction Status, Date Posted, Name/Number, Attorney Docket Number, Charges/ Credits (-), and Account. The table contains four rows of data, all with 'Sale' as the Type and 'Active' as the Transaction Status. The Date Posted for all rows is 10/28/2009. The Name/Number column contains '119' and the Attorney Docket Number column contains '01V'. The Charges/ Credits (-) column contains '\$555.00' and the Account column contains 'CC# ...'. A note at the bottom of the table states: '(*) in the type column indicates that a single payment paid for multiple items or multiple payments paid for a single item.' At the bottom right of the screen, there are links for 'Download to PDF' and 'CSV'.

Section 4 – My Profile

The “My Profile” tab is used to change the password and update the FP contact information.

Change Password

Step 1 of 2 – Click the “Change Password” button (see screen shot below).

The screenshot shows the 'My Profile' page with a navigation menu on the left and a profile information table on the right. The 'Change Password' button in the 'Profile Options' section is highlighted with a red arrow and the text 'Click here to change your password'.

My Profile	
User ID	th
E-mail Address	te @uspto.gov
Company or Organization Name	
Phone Number	571-272
Name	Te
Attention	
Address 1	2051 Jamieson Avenue
Address 2	
City	Alexandria
State	VA
Country	US
Zip/Postal Code	22314

Step 2 of 2 – Enter the current password, enter the new password twice, and then click “Submit” (see screen shot below).

The screenshot shows the 'Change Password' form with a navigation menu on the left and a form on the right. The form includes a disclaimer, instructions, and three password input fields.

Approved for use through 12/31/2011. OMB 0651-0043
U. S. Patent and Trademark Office; U. S. DEPARTMENT OF COMMERCE
Under the Paperwork Reduction Act of 1995, no persons are required to respond
valid OMB control number.

Change Password
Please enter your current password, then your new password (twice).
All items denoted by * are required.

User ID
th

Current Password *
●●●●●●●●

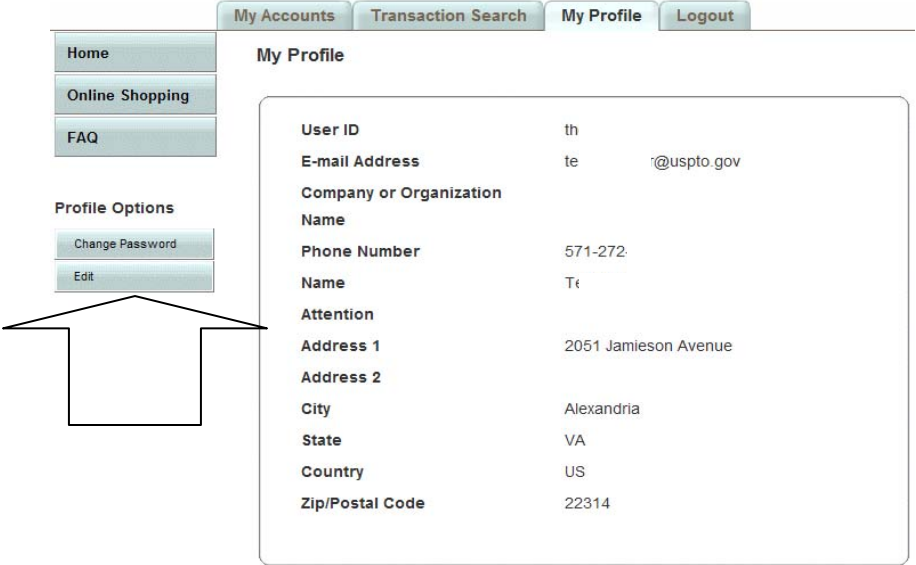
New Password *
(must be 8 to 32 characters with no spaces; case-sensitive)
●●●●●●●●

Re-enter Password *
●●●●●●●●

Submit Cancel

Update FP Contact Information

Step 1 of 2 – Click the “Edit” button (see screen shot below).



Step 2 of 2 – Make the necessary changes, and click “Submit” (see screen shot below).

