

INTAKE: Preparing to File a Patent

This form will help you or your business organize information to present to an attorney for preparing a patent application.

Client Information

Contact Name: _____

Position: _____

Business Name: _____

Address: _____

Telephone: _____ Fax: _____

Mobile: _____ E-mail: _____

Inventor Information

The inventor is the person who originally conceived, or the persons who collaborated in conceiving, a complete and workable embodiment of the invention being claimed. Do not include those who merely followed instructions to build or test the invention. List joint inventors in the order their names will appear on a patent.

Inventor 1 - Name: _____

Address: _____

Citizenship: _____

Telephone: _____ Fax: _____

Mobile: _____ E-mail: _____

Inventor 2 - Name: _____

Address: _____

Citizenship: _____

Telephone: _____ Fax: _____

Mobile: _____ E-mail: _____

Inventor 3 - Name: _____

Address: _____

Citizenship: _____

Telephone: _____ Fax: _____

Mobile: _____ E-mail: _____

Inventor 4 - Name: _____

Address: _____

Citizenship: _____

Telephone: _____ Fax: _____

Mobile: _____ E-mail: _____

Information About the Invention

Answer the following questions in as much detail as possible, in the inventor's words. Attach any relevant information or drawings.

Title of the invention: _____

What is the general field of the invention? _____

Is the invention a method, composition, device, product, or combination? _____

What commercial applications might the invention have? _____

What is the invention intended to accomplish? _____

What were previous approaches taken in this field to accomplish the same purpose as the invention? (If possible, give citations and provide copies for reference.): _____

What are the disadvantages of each of the prior approaches? Why did they fail? What problems did they fail to recognize or address? What extraneous elements do they use? _____

Describe the invention in a way that would enable someone else to practice it, specifying the composition, construction, process steps, and/or operation of the invention. Use reference numbers on sketches, drawings, or flow charts, where appropriate. Point out and explain relationships with associated equipment. Attach any laboratory notebook pages, graphs, photos, reports, manuscripts, or proposals if available, and refer to them in the description as appropriate.

What are the invention's advantages (e.g., low cost, simplicity, speed, accuracy, performance), and what are the most important features? _____

Does the invention satisfy any longstanding needs? _____

Is the invention contrary to the teachings of the prior art? _____

What specific features of the invention's structure, composition, process, and/or operation are believed to be new and nonobvious? For each, what is the broadest conceivable range of options and the preferred values? _____

What are the most preferred embodiments of the invention? Give as many examples as possible.

What variations of the invention would function in substantially the same way to give substantially the same results? _____

On what date did the invention first occur to the inventor? _____

When, where, and to whom, other than co-inventors, was the invention communicated to others?

When and where was the first written description, sketch, drawing, or photograph, if any, made of the invention? Identify notebook, report or other source. _____

Identify pertinent descriptions, reports, summaries, drawings, photographs, etc., subsequent to the first written description. _____

When and where was the invention either first made, or first performed? _____

When and by whom was the invention first tested anywhere for performance (give names of observers)? _____

For any tests that have been conducted, describe the test, the results, and conclusions drawn. Attach any reports: _____

Has the invention been published? When and where? _____

Are any publications planned? When? _____

Has the invention been communicated to others in any way? If so, give details: _____

Are confidentiality agreements in place governing such communication? If so, give details and attach a copy of the agreements: _____

Has a product resulting from the invention been used, sold, or offered for sale anywhere? If so, state when and where: _____

Is there any obligation or intention to assign or license the invention? If so, identify the assignee or licensee by name and address, attach any relevant agreements to assign or license, and explain:

If the invention is under an obligation to be assigned or licensed, is each assignee or licensee (a) a small business having 500 or fewer employees, including affiliates, (b) a nonprofit organization, or (c) an educational institution? If so, provide the name, address, and category for each such entity: _____
