10 Editing Data and Initiating a Petition

10.1 Editing an Initiated Case

Once a case has been initiated, it may be edited using the following steps. **Note:** “Initiation” is the process of creating a new case in E2E. At the end of the initiation process, the case is filed, after which it may or may not be “instituted” by the Board.

1. Log in to PTAB E2E, which will take you to your dashboard (see Figure 1).

![Figure 1: Dashboard](image)

2. Select “My Docket” from the dashboard ribbon (see Figure 2).

![Figure 2: Dashboard Ribbon](image)

3. Select “View My Docket” to be taken to the “My Docket” page.
4. Click on the desired AIA Review number to activate the hyperlink (see Figure 3).

![My Docket](image1.png)

Figure 3. My Docket

5. The AIA Review will open in a new window (see Figure 4).

![New Window](image2.png)

Figure 4. New Window

6. You can edit claims, documents, and metadata following the instructions in 3 File a Petition, but only if the AIA Review is in an “Initiated Status” (see Figure 5).

![Initiated Status](image3.png)

Figure 5. Initiated Status

7. When you have completed making your edits, you may verify the information using the “Review” tab.

8. When you are finished editing, you may close the AIA Review window from your browser.
10.2 Initiate New Petition

**Note:** “Initiation” is the process of creating a new case in E2E. At the end of the “initiation” process, the case is filed, after which it may or may not be “instituted” by the Board.

1. Click on the “AIA review.”
2. You will be taken back to your “Initiate New Petition” wizard
3. Navigate to the section where you would like to edit (see Figure 6)

![Initiate New Petition](image)

**Figure 6. Navigate to Section**
10.3 Petitioner Edit/Add/Delete Claims

1. To add “Claims Challenged”, click the dropdown arrow
2. Select “Statutory Grounds”
3. Enter claims
4. Enter “Prior Art”
5. Click the “Plus” sign to add additional prior Art
6. Click “Add”

Figure 7. Add Claims
7. To edit “Claims Challenged” click on the pencil icon (see Fig 8)

![Figure 8. Edit Claims](image)

8. You may edit or delete your “Claims, Prior Art, and Statutory Ground.”

![Figure 9. Type in Edits](image)

9. Click “Continue” when done

![Figure 10. Type in Edits](image)
10.4 Petitioner Edit/Add/Delete Documents

1. Navigate to the “Petitions Documents” section.
2. Select “Type”: “Paper” or “Exhibit”.
4. Type Document “Name”.
5. Select “Choose File” to attach document.
6. Select “Availability”: “Available for everyone”, “Available to parties and board”, “Available to filing party and board”, or “Available only to the board”.
7. Click “Add”

![Figure 11. Add Petition Documents](image)

10.5 Petitioner Edit/Add/Delete Counsel

1. Select “Counsel Type”: “Lead Counsel”, “First Back up Counsel”, or “Back up Counsel”.
2. Enter counsel’s email address
3. Click on the search icon below to automatically populate the fields (enter First Name, Last Name, or USPTO Registration Number)

![Figure 12. Counsel Information](image)
4. Enter information from left to right, top to bottom. Fields with an asterisks are required fields.
5. Click “Add Counsel” when done.
6. Click “Continue” to move to the next section (see Figure 13)

![Add Counsel Image]

**Figure 13. Add Counsel and Continue**

### 10.6 Patent Owner View All Appearances

1. A Patent Owner or Patent Owner’s Counsel will select “View All Appearances”
2. You will be taken to the “All Appearances” page
3. Click on the “View Mandatory Notice” button AIA Review number to activate the hyperlink
4. You can edit claims, documents, and metadata only if the Mandatory Notice is in a “Pending Submission” status (see Figure 14).

![All Appearances Image]

**Figure 14. All Appearances**

9. You will be taken back to your “Mandatory Notice” wizard
10. Navigate to the section where you would like to edit (see Figure 15 below)
11. Navigate to the “Petitions Documents” section
12. Select “Type”: “Paper” or “Exhibit”.
14. Type Document “Name”.
15. Select “Choose File” to attach document.
16. Select “Availability”: “Available for everyone”, “Available to parties and board”, “Available to filing party and board”, or “Available only to the board”.
17. Click “Add” (see Figure 16).

Figure 15. Add Counsel and Continue

Figure 16. Add Petition Documents
10.7 Mandatory Notice Edit/Add/Delete Counsel

1. Select one of the following from the dropdown (Lead Counsel, First Back up Counsel, Back up Counsel)
2. Enter counsel’s email address
3. Click on the search icon below to automatically populate (First Name, Last Name, and USPTO Registration Number) (see Figure 17).

4. Enter information from left to right, top to bottom. Fields with an asterisks are required fields
5. Click “Add Counsel” when done
6. Click “Continue” to move to the next section (see Figure 18)