

# **PATENT QUESTIONNAIRE**

## **QUESTION 1**

**Give the full name of each inventor who has contributed to the invention described below, along with the telephone number, citizenship, and date of birth of each inventor.**

TYPE ANSWER HERE

### **SAMPLE ANSWER TEMPLATE:**

John Herbert Doe: (555) 555-5555, United States, 10/20/1970  
Susie Ann Que: (555) 555-5555, Canada, 09/22/1975

## **QUESTION 2**

**How would you describe your invention using only one phrase?**

TYPE ANSWER HERE

### **SAMPLE ANSWER TEMPLATE:**

There is really no answer template that would be useful. Nevertheless, some guidance might be helpful.

### **ABOUT THIS QUESTION:**

The answer to this question will help to shape the title of your patent application. Titles can be as long as 500 characters, but a title as long as 500 characters is extremely rare. Most patents have titles that are descriptive and which are 10 words or less. We recommend keeping it short. A title that is a paragraph is not what people expect to see and is unnecessary. When titles are long, information that is not necessary and/or which is more appropriately located in the body of the application is erroneously contained within the title.

Identify what your invention is and then describe it in a straight forward way. For example, if your invention is a screw driver then start with "screw driver" as your title. Then attempt to identify the thing that what most makes your invention unique and patentable. So, if you were the first person to invent a screw driver that can have various types of heads of multiple sizes attached thereto, your title might be something like: "Screw driver having interchangeable heads."

### **ILLUSTRATIVE EXAMPLE ANSWERS:**

**ANSWER 1:** Mobile bullet resistant barrier

**ANSWER 2:** Virtual reality simulator

## **QUESTION 3:**

### **How would you describe your invention in broad general terms?**

TYPE ANSWER HERE

#### **SAMPLE ANSWER TEMPLATE:**

The present invention is a {INSERT BRIEF DESCRIPTIVE PHRASE}, which {INSERT CHARACTERIZATION OF WHAT INVENTION IS AND DOES}. The core components of the invention are {LIST CORE COMPONENTS}, which, generally speaking, are configured as follows: {INSERT BRIEF DESCRIPTION OF CONFIGURATION}. The invention can be used {INSERT EXPLANATION OF WHAT THE INVENTION DOES, ALLOWS or ACCOMPLISHES GENERALLY}. Furthermore, it should be noted that {INSERT OTHER INFORMATION VITAL TO PROVIDING A COMPLETE OVERVIEW OF THE INVENTION}.

#### **ABOUT THIS QUESTION:**

This answer to this question should provide an overview of your invention. You should explain your invention in one paragraph (two at the most), being sure to hit the structural, mechanical and technological highlights. The goal of this question is to provide information to someone who is technically capable of understanding, but only casually interested, much like you might explain to an acquaintance at a cocktail party. To explain this another way, in business terms this would be what is sometimes referred to as the “elevator speech,” which is an abbreviated explanation of the invention you could convey to a captive audience, but only for the duration of an elevator ride.

For most inventions you should normally keep your answer to approximately 150 words, but this is not a hard and fast requirement. The point is that this question should capture the essence of your invention in a straight forward way, describing the invention generically so as to describe all of the various versions of the invention. Therefore, this answer should describe the invention in a way that focuses on the core commonality of all versions of the invention.

#### **ILLUSTRATIVE EXAMPLE ANSWER:**

The present invention is a mobile bullet resistant barrier that has adjustable and removable bullet-resistant glass panes. The barrier includes a frame supporting a bullet-resistant material that can be slid into the frame, the material being substantially transparent. The frame itself generally has a first frame side, a second frame side, the frame sides being substantially parallel to each other. Also, the frame includes multiple cross-tracks, the cross-tracks being perpendicular to the frame sides and connecting the frame sides together. Further, the frame includes a first base member and a second base member mounted perpendicular to the cross-tracks at an end of each frame side for carrying the frame sides. Multiple locking rollers can also be mounted to the base members allowing for easy frame movement.

## QUESTION 4

### What need does your invention fill?

TYPE ANSWER HERE

#### SAMPLE ANSWER TEMPLATE:

It would be desirable to have a/an {INSERT GENERAL CHARACTERIZATION} which/that {INSERT DESIRED CHARACTERISTICS}. Furthermore, it would also be desirable to have a/an {INSERT DESIRED CHARACTERISTICS}. Still further, it would be desirable to have a/an {INSERT DESIRED CHARACTERISTICS}. Therefore, there currently exists a need in the industry for a/an {INSERT WHAT INVENTION DOES}.

#### ABOUT THIS QUESTION:

The answer to this question should identify why and how your invention is different and/or unique. This should clearly and unambiguously be explained in the text of an application. This is because, generally speaking, in order to obtain a patent an invention must be new (i.e., never before done) and it must not be obvious (i.e., not a trivial combination of things already known to exist in the prior art). In order to properly answer this question you will first need to think about the problems your invention solves or addresses. Is your invention a solution to a problem? Is your invention an improvement over known solutions? If your invention is an improvement how is it better than what already exists? Now explain the need your invention fills in terms that highlight the key benefits provided by your invention.

#### ILLUSTRATIVE EXAMPLE ANSWERS:

It would be desirable to have a bullet-resistant barrier that protects a larger area than a hand-held shield and is mobile. Furthermore, it would be desirable for such a bullet-resistant barrier to not only have the ability to protect a larger area, but also to simultaneously provide a full view of immediate and potential threats. Still further, it would be desirable for such a bullet-resistant barrier to protect not only a person, but also an area from hazards such as gunfire, or an explosion. Therefore, there currently exists a need in the industry for a mobile bullet-resistant, explosion proof barrier that can protect a relatively large area while still providing the ability to see through the barrier to identify both immediate and potential threats.

## QUESTION 5

**Concisely describe the most basic version of your invention, including key aspects, core components and technical/mechanical functionality of your invention. Only describe what is absolutely essential for your invention to work. (The next question will focus on options and alternatives.)**

TYPE ANSWER HERE

#### SAMPLE ANSWER TEMPLATE:

The present invention is a {INSERT TITLE}, which is made up of the following components {INSERT LIST OF ALL ELEMENTS ABSOLUTELY REQUIRED}. These components are {INSERT EITHER “RELATED” OR “CONNECTED”} as follows {INSERT DESCRIPTION OF GENERIC CONNECTION/RELATION}.

#### **ABOUT THIS QUESTION:**

The answer to this question will describe only what is absolutely necessary for the invention to work. This will be the no-frills version of your invention.

Your answer to this question may seem similar to your answer to Question 3, but this is to be expected. Patent applications are often redundant, but it is critically important for you not to simply cut and paste your answer to Question 3 here. In fact, it is better not to even refer to your answer to Question 3 when answering this question. The goal of this question is to provide information to someone who is interested in your invention, but who has only limited time, which is why you want to focus on the base version of the invention.

Your answer should include the name of each required, identifiable part of your invention, as well as a technical description (focusing on structure) of each component. Also describe how everything is related. How do the various components fit together mechanically? How do the various components cooperate to create a working invention?

#### **ILLUSTRATIVE EXAMPLE ANSWER:**

The present invention is a mobile bullet-resistant barrier, which is made up of the following components: (1) a frame having a right side, left side, top and bottom, with the right and left sides being substantially parallel to each other and the top and bottom likewise being substantially parallel to each other; (2) at least 1 cross track, which is perpendicular to the right and the left side and which connects the left and right sides; (3) a first support and a second support which are mounted perpendicular to the cross track(s) at each end of the sides; (4) rollers, which are connected to the first support and the second support thereby allowing omni-directional frame movement; (5) a substantially transparent bullet-resistant material that is slid into the frame.

## **QUESTION 6**

### **Describe the optional features of your invention.**

TYPE ANSWER HERE

#### **SUGGESTED ANSWER TEMPLATE:**

The present invention may also have one or more of the following: {INSERT LIST OF OPTIONAL ELEMENTS/CHARACTERISTICS AND CONNECTION DESCRIPTION}.

#### **ABOUT THIS QUESTION:**

The answer to this question builds upon your answer to the previous question. In the previous question you were asked to describe your invention while focusing only on what must be present in order for your invention to work. Now we are asking you to describe any and all optional features of your invention. What could your invention have? It is absolutely essential to think outside the box when describing your invention in any patent application. This is true because the strength of any patent is based on the number of alternatives that are disclosed, and how specifically the alternatives are described. Stop and think about what could be added to the core invention. For example, if you were describing the necessary components of a chair you might say that it has a seat, four legs

connected to the underside of the seat at or near the corners and a back that is connected to the top side of the seat substantially at the edge. Now, after describing the basic structure you are ready to define the optional features. The chair could optionally have arms, or pads that are placed on the bottom surfaces of the legs so that the legs will not scratch hardwood surfaces. Furthermore, the seat could have padding, and be covered with a fabric or material such as leather or vinyl. Notice what we are trying to accomplish here is to embellish the core invention with as much detail as possible. What additional structural components can be added to the core invention described in the previous question?

It is important for you to spend time considering optional features. Failure to disclose options will almost certainly foreclose your ability to say any unidentified options are covered by your disclosure, which will prevent any issued patent from covering those. This may not seem like a big deal, but history has shown that it is critical. If you are lucky enough to have invented something of great importance there will be a number of individuals and companies trying to capitalize on the opportunity you have created. If you dismiss and fail to claim options then you are leaving those to the individuals and/or companies that would seek to file a patent application describing an improved version of your own invention.

#### **ILLUSTRATIVE EXAMPLE ANSWER:**

The present invention may also have one or more of the following: (1) a mechanism allowing retraction and extension of the rollers mounted to the first and second support; (2) a locking mechanism attached to or combined with the rollers so as to inhibit movement of the rollers; (3) adjustable cross-track(s) allowing movement of the bullet-resistant material in the frame; and (4) a latch for maintaining a predetermined position of the cross-track, inhibiting the movement of the bullet-resistant material.

## **QUESTION 7**

### **Describe the most complete version of your invention.**

TYPE ANSWER HERE

#### **SUGGESTED ANSWER TEMPLATE:**

In its most complete version, the present invention is made up of the following components {INSERT LIST OF ALL ELEMENTS}. These components are {INSERT EITHER “RELATED” OR “CONNECTED”} as follows {INSERT DESCRIPTION OF MOST COMPLETE AND PREFERRED CONNECTION/RELATION BETWEEN COMPONENTS}. It should further be noted that: {INSERT SPECIFIC, IMPORTANT INFORMATION REGARDING VARIOUS MATERIALS, SPECIFIC CONNECTION MEANS, ETC}.

#### **ABOUT THIS QUESTION:**

The answer to this question describes the most complete formulation, including any and all options and preferences. Your answer to this question may seem very similar in ways to your answers to Questions 5 and 6, which is exactly what is intended. We are asking you to combine your answers to Question 5 and 6 to create the single most complete version of your invention. While you can certainly refer to your answers to Questions 5 and 6, it would not be as helpful or desirable if you simply cut and paste your answers to Questions 5 and 6 here. Rather, you should start fresh. Doing so is likely to give another perspective and greater protection to the invention.

The best way to describe this “Cadillac” model of your invention is to explain it like a child doing a “show and tell” at school. Children explain everything, no matter how obvious. Kids do this when they describe things because they have no idea what the person listening knows, and to them it is new and interesting so they explain everything with tremendous detail (whether you want to hear it or not). That is exactly what you need to do in the application

and in your answer to this question. Explain your invention with so much detail that you will bore the knowledgeable reader to death. Describe how everything is related, using as much detail as possible. How do the various components fit together mechanically? How do the various components cooperate to create a working invention?

#### **ILLUSTRATIVE EXAMPLE ANSWER:**

In its most complete version, the present invention is made up of the following components: (1) a frame having a right side, left side, top and bottom, with the right and left sides being substantially parallel to each other and the top and bottom likewise being substantially parallel to each other; (2) a substantially transparent bullet-resistant material that is slid into the frame; (3) at least 1 cross track having a latch for maintaining a predetermined position, which is perpendicular to the right and the left side and which connects the left and right sides, and which is adjustable allowing movement of the bullet-resistance material in the frame; (4) a first support and a second support which are mounted perpendicular to the cross track(s) at each end of the sides; and (5) rollers having an integrated locking mechanism, which are connected to the first support and the second support thereby allowing omni directional frame movement. The first support and the second support also have attached just above the rollers a mechanism allowing retraction and extension of the rollers.

## **QUESTION 8**

**With an eye toward structure (in the case of a device) and procedure (in the case of a method or process), please describe what makes your invention different than other available solutions/inventions.**

TYPE ANSWER HERE

#### **SUGGESTED ANSWER TEMPLATE:**

The present invention is unique in that it is structurally different from other known devices or solutions. More specifically, the present invention is unique due to the presence of: (1) {INSERT DESCRIPTION}; (2) {INSERT DESCRIPTION}; and (3) {INSERT DESCRIPTION}.

#### **ABOUT THIS QUESTION:**

The answer to this question is extremely important because any patent that issues will protect the substance of what you have invented. The substance of your invention must be different from the prior art, and must not be a trivial combination of the prior art.

For inventions having a physical, tangible manifestation, the substance you need to focus on is structure. What are the structural differences between your invention and the prior art? Your invention could be different because it has more components, has fewer components, combines components, structures components differently, etc. Try and identify as many differences as possible. The more the better! What may seem like a minor difference to you could make all the difference in the eyes of the patent examiner, so each and every identifiable structural difference should be detailed.

For inventions that are primarily a process or method, including those that relate to computer methods (i.e., software, e-commerce, etc.) the substance on which you need to focus may or may not be of a structural nature. The substance of a process or method would normally be related to the techniques employed, steps added or steps condensed. Again, be as explicit as possible and identify any and all differences.

**ILLUSTRATIVE EXAMPLE ANSWER:**

The present invention is superior to other known devices because it: (1) provides a golf cart/bag assembly that is combined as a single unit, which allows for easy, safe storage and transporting of golf clubs and accessories; and (2) eliminates storage problems within most automobiles or other vehicles that many times prevent golfers from taking their golf clubs along on vacations and business trips.

**QUESTION 9**

**With an eye toward functionality and use, please describe what makes your invention different than other available solutions/inventions.**

TYPE ANSWER HERE

**SUGGESTED ANSWER TEMPLATE:**

The present invention is unique when compared with other known devices and solutions because the present invention provides: (1) {INSERT DESCRIPTION}; (2) {INSERT DESCRIPTION}; and (3) {INSERT DESCRIPTION}.

**ABOUT THIS QUESTION:**

The answer to this question describes what makes your invention different than other available solutions/inventions that you identified. While focusing on differences in general is good, the focus should be on the differences that make your invention superior and/or more desirable. In answering this question provide as much detail as possible. List each and every difference you can think of with respect to functionality and usage.

**ILLUSTRATIVE EXAMPLE ANSWER:**

The present invention is superior to other known methods and systems because: (1) a user can create, edit store, and distribute graphical diagrams of logical network layouts; (2) the diagrams can be created automatically and then edited and distributed by the user; and (3) the method and system allows tracking every network device, passive and active, and provides for associating network devices with the appropriate physical and logical locations, specifications, serial numbers, warranty information and other relevant information.

**QUESTION 10**

**Is there anything else about your invention that you feel is important for us to know and which you have not yet stated in response to any of the preceding questions?**

TYPE ANSWER HERE

#### **ABOUT THIS QUESTION:**

Questions 1 through 9 are intended to provide us with the basic information necessary to produce a first draft of a patent application relative to your invention. Here we are asking for any additional information that you may have and believe is relevant. There is no need to reiterate what you have already stated, but if there is any additional information you wish to convey, please do so here.

#### **QUESTION 11**

**If any inventor has transferred ownership of the invention, will transfer ownership, or is under an obligation to transfer ownership, please provide the name, correspondence information, and nature of ownership (e.g. all inventors assigned to owner; inventor 1 is under an obligation to assign to owner pursuant to an employee agreement; inventor 1 is licensing the invention to owner, etc.). If you are unsure, we request that you send your employment contract along with this questionnaire.**

TYPE ANSWER HERE

#### **QUESTION 12**

**Are there any materials disclosing the invention (e.g. photographs, schematics, published papers, prototypes, etc.)? If so please list them below and send copies of any disclosure materials along with this questionnaire.**

TYPE ANSWER HERE

#### **QUESTION 13**

**If any owner is an organization, is the organization a non-profit organization (e.g. university)?**

TYPE ANSWER HERE

#### **QUESTION 14**

**If any owner is an organization, does the organization have 500 or fewer full time and part time employees?**



TYPE ANSWER HERE

### **QUESTION 15**

**Have you already filed a patent application for the invention in the United States or a foreign country? If so, please provide the application information for each application in the space below, including the country of filing, date of filing, type of application (e.g. Community Design, provisional, etc.), application number, and status of application (e.g. pending, expired, expressly abandoned, etc.).**

TYPE ANSWER HERE

### **QUESTION 16**

**If you have previously filed a patent application for the invention, in what way does the present invention include additional features that are not disclosed in the prior-filed application?**

TYPE ANSWER HERE

### **QUESTION 17**

**Have you publically used or disclosed the invention in the United States or a foreign country? If so, please describe any such disclosure in the space below, including the date of first disclosure, country of disclosure, and nature of disclosure (e.g. paper presentation at a conference, published in journal, demonstrated invention to investors, etc.)**

TYPE ANSWER HERE

### **QUESTION 18**

**Have you sold or offered for sale the invention in the United States or a foreign country? If so, please describe any such sale or offer for sale in the space below, including the date of sale or offer for sale, country of sale or offer**

**for sale, and nature of sale (e.g. solicit government funding, sold to investor, selling online, etc.)**

TYPE ANSWER HERE

## **QUESTION 19**

**Are you aware of any patent, patent publication, or any other reference that discloses a similar invention? If so, please list any such patent or patent publication in the space below.**

TYPE ANSWER HERE

## **QUESTION 20**

**Are you aware of any similar invention? If so, please describe any such invention and how you became aware of it (e.g. saw similar invention at a trade show, based invention off of a competitor's device, etc.)**

TYPE ANSWER HERE

## **QUESTION 21**

**Have you scheduled any upcoming public disclosure date for the invention? If so, when?**

TYPE ANSWER HERE

## **QUESTION 22**

**To whom should we direct all correspondence regarding your patent application? The person(s) you identify will also be the person(s) from whom we will receive instructions regarding the application.**

TYPE ANSWER HERE

## **QUESTION 23**

**To whom should we direct any invoices for the application? The person(s) you identify will be responsible for payment of any invoice related to the application.**

TYPE ANSWER HERE

## **Acknowledgment of Confidentiality of Communications**

At G. Philip J. Zies, PLLC, we take the protection of our client's and potential client's intellectual property seriously. Since there are dangers in communicating sensitive and/or proprietary information by email, we would like to provide you with the following information.

Please read each of the items listed below carefully and then initial each item to indicate you understand and acknowledge each item. *Please note that your failure to initial and acknowledge each item may limit our ability to communicate with you regarding this matter.*

\_\_\_\_\_ I understand that communications between myself and an attorney, which would normally be subject to attorney-client privilege, may be waived if a third party gains access to those communications.

\_\_\_\_\_ I understand that third parties may have access to my attorney-client emails when I send or receive emails via a public computer, such as a library or hotel computer, or via a borrowed computer.

\_\_\_\_\_ I understand that a third party (i.e. my employer) may have access to my attorney-client emails when I utilize my work computer.

\_\_\_\_\_ If I must communicate with an attorney via a public computer or a work computer, I will only send confidential information via encrypted or password-protected documents, such as a password-protected Word® document or a password-protected .pdf document.

\_\_\_\_\_ If I must communicate with an attorney via a public computer or a work computer, I will alert the attorney accordingly and request that the attorney only send confidential information via encrypted or password-protected documents.