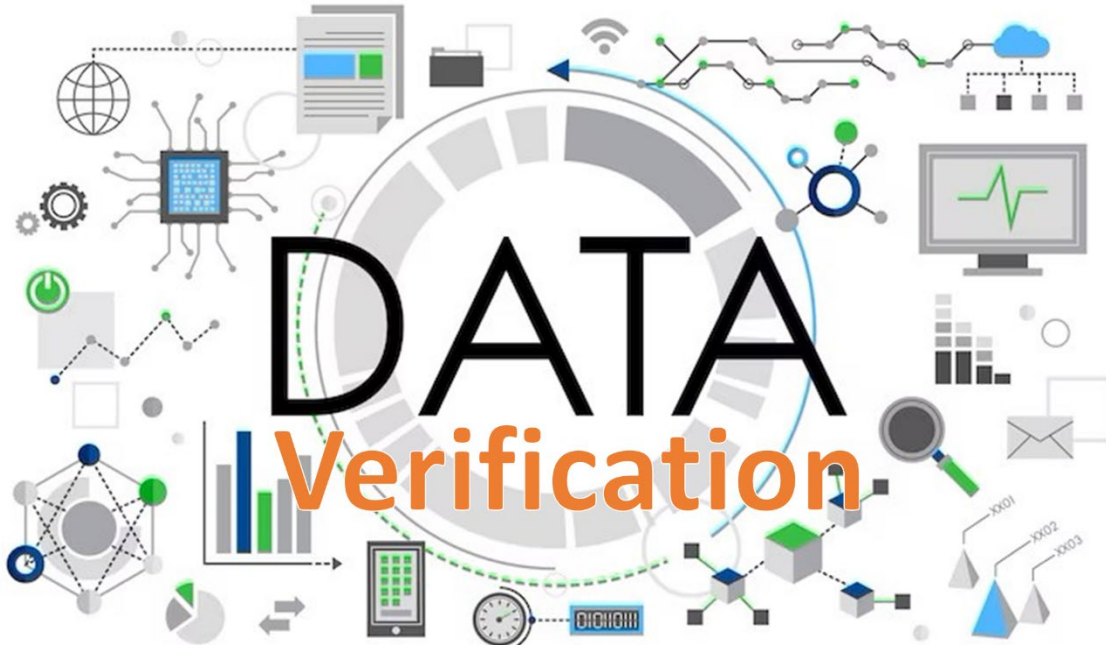


# Data Verification

## IP Portfolio Accuracy and Integrity

Innoastra

# Data Verification: IP Portfolio Accuracy and Integrity



## Introduction

Not getting Intellectual Property (IP) data validated can lead to potential risks such as legal disputes, loss of intellectual property rights, and compromised business reputation.

Data verification is a process that ensures the accuracy, consistency, and reliability of data within a system or database. It plays a vital role when it comes to Intellectual Property portfolio management. An IP management system is managed by various individuals such as docketer, paralegal, attorney, outside counsel etc. This article explores the outcome, methodology and benefits of data verification.

## What is Data Verification?

Data verification is the process of checking and validating data to confirm that it is correct, complete, and free from errors. The process involves cross-referencing and validating data against reliable sources, such as official records, databases, or trusted references, finally updating the docketing software to reflect the correct information.

## Outcome of Data Verification

The result of successful data verification is a verified dataset that can be confidently used for analysis, reporting, decision making, or any other intended purpose. It helps prevent errors, misinformation, and potential problems that could arise from inaccurate data. We mention a few critical fields that are verified and corrected.

### 1. Accurate & consistent bibliographic information

Accurate and consistent data are the pillars of data management. When it comes to intellectual property, number formats differ for each jurisdiction and these formats should be consistent for the entire data. Name of the inventors, applicants, attorneys and paralegals assigned for each matter should be consistent. Data inconsistency will have a direct impact on the portfolio reports or other IP reports which needs to be pulled from the docketing system at regular intervals for effective IP portfolio management.

### 2. Accurate and consistent Dates

The basis of any docketing system relies on correct dates entered and in the right date format. Incorrect dates entered will generate incorrect official deadlines and reminders. All the docketing software have an inbuilt date format – British English and American English, with various people entering dates from different locations and regions, an incorrect date format is inadvertently entered.

### 3. Renewal

An incorrect filing date entered in the docketing software will automatically generate an incorrect annuity or renewal date which can lead to unplanned abandonment of a patent or trademark. A data verification exercise will help in avoiding that abandonment and will accurately generate all the future maintenance dates.



removed from the database.

### 4. Missing and Duplicate Records

With the ever increasing and complex patent families, there are certain cases which are either not docketed in the software all together or are not linked to the family cases. Data verification identifies any missing cases in the portfolio and, also helps in linking all the cases to its respective families. This makes it easier to cross cite references during IDS preparation. Likewise, duplicate records are identified and

## 5. Priority information

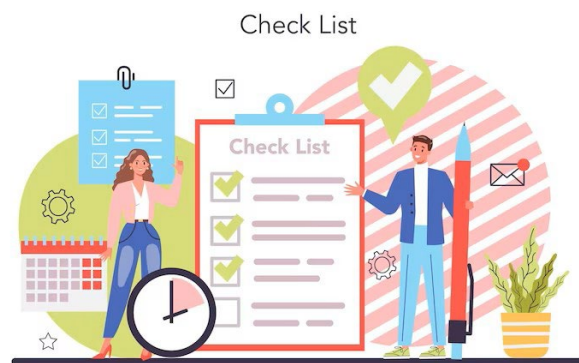
When a new case is created in a docketing software with the incorrect priority information it can lead to loss of rights for that particular matter and all the other following matters for that family. Data verification checks all the priority information such as number, date, etc and ensures first filing date is correctly claimed.

## Methodology of Data Verification

Over the years data verification process has seen changes based on the information readily available at the various PTOs and the ability to pull the information and compare with the existing information. The good age-old method of manual verification and the home-grown tools to assist with automated verification combined make an ideal data verification process.

### 1. Manual Verification

Manual verification is a time-consuming process which entails manually checking all the information downloaded in an excel sheet with the information available at the patent and trademark office site. Manual verification is prone to human errors but is essential for situations where the IP information cannot be accessed or downloaded from the PTO site.



### 2. Automated Verification

Various organisations have created home grown tools, macros, website crawlers, etc to enable with the data verification process. This automated process ensures a high degree of quality and efficiency. These tools will automatically download the data from the PTO sites and compare the same with the data available in the docketing tool and highlight the discrepancies.

### 3. Involvement of Foreign Associates

There are certain patent and trademark offices which are not online and still work through paper files. Although more and more offices are moving towards digitization, but we still have lot of jurisdictions which are not digitized. At these jurisdictions the only source for verifying the information is a local agent present in the same city to walk up to the PTO and manually verify the paper files with the information provided. This is again a very time consuming and costly method but it's the only way out.

## Conclusion:

Data verification is a critical aspect of data management that ensures the reliability and accuracy of information. While this can be avoided at the onset with a well-documented process, but over time data inconsistencies do creep in. It is advised to undergo a data verification exercise every 6 months for the entire portfolio or for the additional cases filed in the past 6 months. This exercise should also be followed for the patents granted to ensure correct maintenance dates are generated and there is no loss of IP rights.

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## About InnoAstra

InnoAstra renders end-to-end IP life cycle management services to an array of entities for streamlining their IP processes – from conceptualization to actualization to commercialization.

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