



Bios

Business Methods

Virtual Customer Partnership Meeting

September 13, 2022

UNITED STATES
PATENT AND TRADEMARK OFFICE



Opening Remarks

Robin Evans Deputy Commissioner for Patents

As Deputy Commissioner for Patents, Ms. Evans manages and leads patent examining functions in Technology Centers that examine a wide variety of technology including transportation, construction, agriculture, electronic commerce and national security, as well as biotechnology and organic chemistry arts. She also provides executive leadership to the quality related offices responsible for training, process improvement, quality statistics and stakeholder experience.

Ms. Evans began her career at the USPTO as a patent examiner focused on applications in the mechanical area. She served as a Supervisory Patent Examiner in the areas of electrical heating technology and the fluid handling technologies. She also served as a Management Quality Assurance Specialist in related fields.

Ms. Evans was selected as the first Regional Manager of the first USPTO regional office located in Detroit, Michigan. She was then appointed to the Senior Executive Service as a director of Technology Center 2800. Shortly after being appointed, Ms. Evans served as the interim Director of the Rocky Mountain Regional Office in Denver, Colorado. Prior to her present role, Ms. Evans served as Acting Associate Commissioner for Patent Quality.

Ms. Evans holds a Bachelor of Science degree in mechanical engineering from the University of Maryland.



Director's update

Tariq Hafiz Director, Technology Center 3600

Tariq joined the U.S. Patent and Trademark Office (USPTO) in 1992 as a patent examiner and in 2012 became a Group Director for Technology Center 2600 specializing in Communications and in 2016 was assigned to be a Group Director for Business Methods in TC 3600.

In Business Methods, Tariq has helped improve the examination with respect to subject matter eligibility rejections, quality of office actions and communication with stakeholders. Tariq is a lead on interview practice team that provides support and training for internal and external stakeholders on interview practice. He led the efforts to develop automated interview request where stakeholders can schedule interview with examiners online. Tariq is also the executive lead on after final consideration pilot program. Tariq is also on the USPTO national science and technology council subcommittee with subgroup of nanotechnology. Prior to USPTO, he worked in software development at Computer Sciences Corporation for over three years. Tariq earned a bachelor's degree in physics from the College of William and Mary with graduate work in electrical engineering from Virginia Tech.



Director's update

Deborah Reynolds Director, Technology Center 3600

Ms. Reynolds is currently a technology center director in the business methods area of Technology Center (TC) 3600. Ms. Reynolds previously held the position of deputy chief patent academic officer of the office of patent training. As the deputy she was responsible for providing critical training and education to patent examiners, patent managers and other patent employees. She joined the ranks of the senior executive service in 2011. Prior to joining the office of patent training, Ms. Reynolds was both a quality assurance specialist and a supervisory patent examiner for TC 1600. She joined the U.S. Patent and Trademark Office in July 1996 and examined patent applications in the gene therapy and transgenic animal arts in TC 1600. Ms. Reynolds progressed to primary examiner and was promoted to supervisory patent examiner in November of 2000.

Ms. Reynolds is also an executive lead on patent training at headquarters (PaTH) event, Est. 1790, patents across America (PAA), strategic leadership forum (SLF), and executive lead on Clear and Concise Writing for Patent Examiners.



Strategies for prosecuting and navigating fintech patents

Kevin Rodkey

Partner, Finnegan, Henderson, Farabow, Garrett & Dunner, LLP

Kevin Rodkey focuses his practice in the areas of post-grant review proceedings, patent litigation, client counseling and portfolio management, and transactions. Kevin advises clients on prosecution and management strategies, patent validity and infringement opinions, and due diligence investigations in many areas of technology. Kevin also represents both patent owners and patent challengers in post-grant review proceedings for diverse technology areas. His technical expertise includes fintech, data processing, optical systems, mobile devices, consumer products, and specialty materials.



Strategies for prosecuting and navigating fintech patents

Justin Mullen Senior Counsel, Patents, Capital One

Justin Mullen is a Senior Counsel at Capital One Financial Corporation, where he is responsible for building and maintaining Capital One's patent portfolio and invention culture. Before joining Capital One, Justin assisted clients in private practice with patent prosecution, PTAB proceedings, and litigation across a variety of forums. His career in intellectual property began at the U.S. Patent and Trademark Office as a patent examiner in Technology Center (TC) 2400. Justin received his law degree from Georgetown University Law Center and completed undergraduate studies in electrical and computer engineering and computer science at Duke University.



Strategies for prosecuting and navigating fintech patents

Leonard Stewart

Assistant General Counsel for Intellectual Property, FIS

Leonard (“Len”) Stewart is Assistant General Counsel for Intellectual Property at FIS, which is a leading provider of technology solutions for financial institutions and businesses of all sizes and across any industry globally. Len supports the chief IP counsel regarding establishing and executing a patent filing, portfolio management, and risk mitigation strategy related to digital and financial services technologies (“fintech”).

In a previous role as senior corporate counsel for Caterpillar Digital (“Digital”), Len provided legal counsel, primarily supporting the vice president of Digital, regarding IP, data, and commercial risks associated with developing and commercializing digital and data analytics products, services, technologies, and solutions.

Len received a bachelors of science in electrical engineering from Louisiana State University (LSU), a masters of science in applied economics from the University of Texas at Dallas (UTD), and a juris doctorate from the University of Notre Dame.



Strategies for prosecuting and navigating fintech patents

Christine Behncke

Supervisory Patent Examiner, Technology Center 3600

Christine joined the U.S. Patent and Trademark Office (USPTO) in 2004 as a patent examiner in vehicle control, navigation, relative location and robotic control. Christine was promoted to a supervisory patent examiner (SPE) in technology center (TC) 3600 in the business methods technology, specifically operations research in 2014. In 2015, Christine worked in the office of international coordination. Christine rejoined TC 3600 as a SPE in 2018 and currently works in finance, insurance and banking technologies. She has an electrical engineering bachelors of science degree from the University of Wisconsin- Madison and a juris doctorate from Catholic University of America, The Columbus School of Law. She is an active member of the Virginia bar. Outside the USPTO, Christine is active in and has served as president of the Pauline Newman IP American Inn of Court and is an active volunteer for Alexandria Senior Services.



Petitions practice

Kristen Matter

Petitions Examiner, Office of Petitions, USPTO

Kristen joined the U.S. Patent and Trademark Office (USPTO) in August 2006 as a patent examiner in the medical device area. Shortly after becoming a petitions examiner in August 2020, Kristen served one year as acting deputy director for the office of petitions. Prior to petitions, Kristen spent six years as a generalist patent examiner in the pro se assistance program and provided outreach to the innovation community in New York City as part of the USPTO-Cornell Tech partnership. Kristen has earned a bachelors of science in mechanical engineering, masters of science in mechanical engineering, and masters of science in biomedical engineering from The Ohio State University as well as a juris doctor from Fordham University School of Law. She is a member of the District of Columbia Bar and the Ohio Bar (inactive).



Petitions practice

Jason Olson

Acting Deputy Director, Office of Petitions, USPTO

Jason joined the U.S. Patent and Trademark Office in 2002 as an examiner in dynamic magnetic storage systems. Additionally, he examined in area of display peripheral interface input devices and display driving control circuitry. Jason became a primary examiner in 2008. As an examiner, Jason completed details as a technology quality assurance specialist in Technology Center (TC) 2600 and as a search expert. He joined the pro se assistance art unit in 2016, which specializes in the examination of pro se and micro entity applications. Jason completed a detail as a petitions examiner in the office of petitions and was subsequently hired as a petitions examiner in 2020. Currently, Jason is on detail as the acting deputy director of the office of petitions. Jason received a bachelors of science in electrical engineering from Texas A&M University in 2001. While working at the USPTO, Jason received a masters of science in engineering management from George Washington University in 2006.



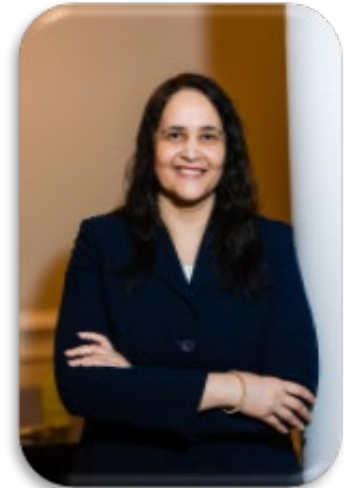
Prosecuting machine learning patents

Namrata (Pinky) Boveja Acting Director, Technology Center 3600

Namrata (Pinky) Boveja currently serves as the acting director in the mechanical section of Technology Center (TC) 3600. Ms. Boveja also serves as a supervisory patent examiner (SPE) for Art Unit 3696 responsible for examining patent applications in the insurance, finance, and banking technology areas in the Business Methods section of TC 3600. She joined the U.S. Patent and Trademark Office in 2005 as a patent examiner in the advertising, incentive programs, and coupon technology areas and became a SPE in 2011 in the same area in the business methods section of TC 3600.

Previously, Ms. Boveja served as an advisor in the Office of the Commissioner for Patents, and as an attorney and business analyst reviewer at the United States Trade Representative Executive Office of the President. Additionally, Ms. Boveja served as the acting deputy director for the office of petitions supervising attorney advisors, petitions examiners, and paralegal specialists.

Ms. Boveja received a bachelor of science in mechanical engineering and a master of business administration from the University of Maryland College Park. Additionally, she received a juris doctor from the University of District of Columbia, and is currently an active member of the Maryland bar.



Prosecuting machine learning patents

Sumedha Ahuja Partner, Perkins Coie LLP

Sumedha Ahuja focuses on strategic patent portfolio management and patent prosecution with specific emphasis on computer software, internet, and artificial intelligence/machine learning inventions. She has successfully drafted and prosecuted over 100 patent applications for both large corporations and startups at the U.S. Patent and Trademark Office and foreign patent offices.

Sumedha's experience spans a great depth and breadth of technical areas, including telecommunications, business models, mobile applications, advertising and behavioral analysis, search and search result processing, blockchain, IoT, cloud computing, and virtual computing. Sumedha has also represented both patent owners and petitioners before the U.S. Patent and Trademark Office (USPTO) Patent Trial and Appeal Board (PTAB) in more than two dozen post-grant proceedings, including *inter partes* reviews and covered business method reviews.

Prior to practicing law, Sumedha was a software engineer at Sapient Corp., where she designed, developed and deployed software solutions for large enterprise clients. As a graduate student at McGill University, Sumedha was a member of both the Mobile Robotics Lab and the Reasoning and Learning Lab, where she focused her research on developing recommendation systems using various machine learning techniques.



Prosecuting machine learning patents

Steven D. Lawrenz Partner, Seed IP

Steve Lawrenz works with his clients to develop highly-strategic patent portfolios in computer software, artificial intelligence, and Internet technologies. He evaluates third-party patent portfolios to counsel on avoiding patent infringement. He also advises on the merits of acquiring particular patent assets.

Before law school, Steve worked as a software developer for IBM. After beginning his legal career at Seed IP, Steve helped to found Perkins Coie's patent procurement practice; while a partner at that firm, he served as Technology Committee chair.

Steve is admitted to the Washington State Bar and is registered to practice before the U.S. Patent and Trademark Office. He is a member of the Washington State Patent Law Association. Steve is admitted to practice in the U.S. Court of Appeals for the Federal Circuit and the U.S. District Court for the Western District of Washington. He serves on the University of Illinois College of Law Seattle Alumni Chapter board



Prosecuting machine learning patents

Lennie Bersh Shareholder, Greenberg Traurig LLP

Lennie A. Bersh is a Shareholder in the Intellectual Property & Technology Practice of the firm's New Jersey office. Lennie is experienced in developing and implementing patent strategies for building global patent portfolios, prosecuting patents, and counseling in a number of technologies areas, including: artificial intelligence and machine learning in numerous areas, including fintech, medical applications and applications related to visual detection/tracking of subjects and objects; electronic healthcare, including medical data modeling via synthetic data and visualization; blockchain and crypto technologies; big data; numerous e-commerce and enterprise cloud technologies; smart industrial and home devices and automation processes; and cyber-security art areas.



Prosecuting machine learning patents

Barry Schindler

Co-Chair of Global Patent Prosecution Group, Greenberg Taurig LLP

Barry J. Schindler is Co-Chair of Greenberg Traurig's Global Patent Prosecution Group. Barry has over 30 years of legal experience in all aspects of patent prosecution and IP protection. Barry has obtained hundreds of U.S. patents for his clients, and has worked with foreign counsel in China, France, Germany, Japan, Saudi Arabia, South Korea, Russia, and the United Kingdom, among others, to obtain foreign patents for firm clients.

Barry received his B.S. in Chemical Engineering (Process Control) from Cornell University. Prior to law school, Barry practiced for over eight years for major Fortune 100 companies. He received his J.D. from the University of Houston Law Center and is admitted to practice in New York and New Jersey, and before the U.S. Patent and Trademark Office. Barry regularly teaches patent strategy at Universities, the USPTO and incubators. Barry regularly writes on key patent topics and is frequently quoted. Barry's passion is supporting Family Promise of Morris County – dedicated to ending the crisis of homeless families.



Interview practice refresher

Michael Thier

Supervisory Patent Examiner, Technology Center 2400

Michael joined the U.S. Patent and Trademark Office (USPTO) in 2005 as a patent examiner specializing in telecommunications. During his time working as a telecommunications examiner he also assisted in examining multiplex communication applications, and in 2012 became a supervisory patent examiner in the multiplex communications area. As a supervisor at the USPTO Michael has served on numerous details and programs throughout his career, with most related to employee engagement and outreach. Michael has been one of the lead interview specialists for the USPTO since 2013, and routinely assists in creating and providing training to patent examiners on interview practice and policy. Michael has worked on educating applicants on the use of interviews and video conference interviews, and currently participates in outreach and assistance to applicants with interview practice and policy. Michael earned his bachelors of science degree in electrical engineering from The Pennsylvania State University.



Closing remarks

Gladys Corcoran Assistant Commissioner, USPTO

Ms. Corcoran, in her current role as Assistant Commissioner directly oversees technology centers responsible for examining patent applications in the technology areas of biotechnology, organic chemistry, transportation, construction, agriculture, electronic commerce, and national security.

Previously, Ms. Corcoran was a group director for the technology center examining patent applications in the chemicals and materials engineering arts. She served as USPTO's Director of Communications and Branding for the Office of the Chief Communications Officer and a senior advisor for the Associate Commissioner for Patent Planning and Resources.

Ms. Corcoran began her career at the USPTO as a patent examiner examining patent applications in adhesive bonding and miscellaneous chemical manufacturing. She later became a supervisory patent examiner and acting director in the chemical engineering arts. In 2009 she was acting director overseeing the semiconductor arts and in 2008 she was a class manager for the Office of Patent Training.

Ms. Corcoran received a bachelor of science in chemical engineering from the University of Virginia, a juris doctor from the George Washington University Law School, and is currently an active member of the Virginia bar.

