



Docketing Safety Net Checklist

For Busy IP Attorneys & Firms

Core Docket Coverage

- Trademark deadlines tracked (SOU, renewals, Section 8 & 15, opposition deadlines).
- Patent deadlines tracked (IDS, maintenance fees, responses to Office Actions, continuations).
- TTAB & PTAB matters docketed with reminders at multiple intervals (30, 14, 7 days out).
- International deadlines (Madrid Protocol, PCT) entered with proper time-zone adjustments.

Systems & Safeguards

- Cross-check deadlines against USPTO and WIPO systems for accuracy.
- Backup system in place (cloud + secondary calendar export).
- Escalation protocol for urgent deadlines (who gets notified if an attorney is out).
- Overflow coverage plan for vacations, illness, or staff absences.

Quality Control


- Two-tier QC process (contractor prepares, supervising paralegal/attorney reviews).
- Confirmation of filings saved and logged in docket.
- Status reports generated weekly/monthly for attorney review.
- Audit schedule (quarterly or semi-annual review of the entire docket).

Communication

- Centralized intake system for attorney instructions (email categories, Teams/Planner, or portal).
- Automatic task creation from attorney emails to avoid manual oversight.
- Single point of contact for attorneys to reduce confusion.

Why This Matters

Missed deadlines = malpractice exposure. A safety net ensures your firm stays on track, even when staff are overwhelmed.

 **Next Step:** Stop juggling this alone. Book a 15-Min Fit Call and let Paralegal Virtual Solutions® be your firm's safety net.

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