

## UTBMS TRADEMARK BILLING CODES

Code	Identifier	Description
<i>TR100 - Assessment, Development, and Administration</i>		
TR110	Fact Investigation and Development	All actions to investigate and understand the facts of a matter that are not included under another trademark task code below. Covers initial meeting to discuss new matter, interview of client personnel and potential witnesses, review of documents to learn the facts of a potential case, work with an investigator, and all related communications and correspondence.
TR120	Analysis/Strategy	The thinking, strategizing, and planning for a case that is not included under other trademark task codes below. Includes discussions, writing, and meetings on case strategy. Also includes initial legal research for case assessment purposes and legal research for developing a basic case strategy. Most legal research and/or other activity will be under the primary task for which the research is conducted, such as research for a response to an office action under TR430 and TR630 respectively.
TR130	Document/File Management	A narrowly defined task that includes creating and populating document and other databases or filing systems, that does not fit under other task codes below. Includes the planning, design, and overall management of this process. Work of outside vendors in building litigation support databases should be an expense under E100. Calendaring (or "docketing" in the U.S.) should be included under the appropriate task codes below for each matter unless, otherwise instructed by the client.
TR140	Budgeting	Covers developing, negotiating, and revising the budget for a matter that does not fit under other task codes below. Cost estimates which are included as part of other activities, such as reporting an Official Communication from a Trademark Office, should be included under the appropriate task codes below, unless otherwise instructed by the client.
TR199	Other Assessment, Development, or Administration	Use only for assessment, development, administration and other activities that can not be included under a previous code, or as instructed by the client.

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Code	Identifier	Description
<i>TR200 - Trademark Investigation and Analysis</i>		
TR220	Registability Investigation	All actions associated with determining the initial availability and registerability of a particular trademark, including the definition of the scope of protection, searching, analyzing search results, and reporting results to the client. Also known as a "knock out" search, or 'preliminary' search, it is the most general type of trademark search which usually encompasses a review of trademark registry records, such as pending trademark applications, active trademark registrations, and abandoned trademark applications and registrations. Preliminary searches are conducted to determine if a full clearance investigation is warranted under TR230. Work of outside vendors in conducting searches or otherwise assisting the investigation should be an expense under E100. Any formal opinion should be prepared under TR710.
TR230	Clearance Investigation	All actions associated with determining the final availability and registerability of a particular trademark, including definition of the scope of protection, searching, analyzing the search results, and reporting the results to the client. Also known as a "full" search, a clearance search is the broadest type of trademark search which includes review of pending trademark applications, active trademark registrations, abandoned trademark applications and registrations, public and corporate records, government publications and various databases. Any formal opinion should be prepared under TR710. Work of outside vendors in conducting searches or otherwise assisting investigation should be an expense under E100.
TR240	Opposition Investigation	All actions associated with investigating a claim or potential claim of trademark opposition, trademark infringement or trademark dilution before a trademark office tribunal, including definition of the scope of the investigation, searching, analyzing the search results, and reporting the search results to the client. Work of outside vendors in conducting searches or otherwise assisting the investigation should be an expense under E100. This code set is for determining the facts and recommendations of an opposition matter. Any formal opinion should be prepared under TR710. Any subsequent work completed in a contested matter would be completed under TR440 or TR640 respectively.

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<b>Code</b>	<b>Identifier</b>	<b>Description</b>
TR250	Publication Watches	All actions associated with planning, completing, and reporting the results of periodic searches for conflicting trademarks. For example, this may include monitoring the file history of trademark applications, and/or publication for opposition. Work of outside vendors in conducting searches or otherwise assisting the investigation should be expensed under E100.
TR260	Enforcement Investigation	All actions associated with investigating a claim or potential claim of trademark infringement, dilution or unfair competition before a court of jurisdiction, including definition of the scope of the investigation, searching, analyzing the search results, and reporting the search results to the client. Work of outside vendors in conducting searches or otherwise assisting the investigation should be an expense under E100. This code set is for determining the facts and recommendations of an enforcement matter. Any subsequent work completed in a contested matter would be expensed under general litigation codes. Any formal opinion should be prepared under TR710.
TR270	Status Investigation	All actions associated with determining the status of a pending or registered trademark, including inquiries with the trademark office, directing outside counsel and database review, and forwarding status report to the client. Includes annuities or maintenance fee status investigations. Work of outside vendors in conducting searches or otherwise assisting the investigation should be an expense under E100.
TR299	Other Trademark Investigation and Analysis	Use only for trademark investigation and analysis activities that can not be included under a previous code or as instructed by the client.

## UTBMS TRADEMARK BILLING CODES

Code	Identifier	Description
<i>TR300 - Domestic Trademark Application Preparation</i>		
TR310	Application Preparation and Filing - Domestic	All actions associated with completing a trademark or service mark application (including renewal applications) that is to be filed in the ("domestic") home country or region of the applicant, including obtaining the specimen of use from the client, scanning the specimen for electronic filing, discussion with the client to ascertain the dates of first use and first use in commerce, drafting and revision of the application, preparation and filing of the application by electronic or paper formats, and reporting the results to the client. This section includes all domestic trademark and service mark applications filed on the Principal or Supplemental Register. Note that government fees and external expenses (or "disbursements" in the U.S.) are included under E100.
TR399	Other Domestic Trademark Application Preparation and Filing	Use only for trademark application preparation activities that can not be included under a previous code or as instructed by the client.
<i>TR400 - Domestic Trademark Prosecution and Renewal</i>		
TR410	Affidavits, Petitions, Extensions, Declarations and Other Filings - Domestic	All action associated with processing affidavits, petitions, extensions, declarations, and change of correspondence with the Trademark Office in the home country of an application filed under TR300, including initial review and any calendaring ("docketing" in the U.S.) of any response deadline, report to client with any proposed response, review of applicant's instructions and comments, preparation of affidavits, petitions, extensions, declarations, change of address or change of ownership and/or responsive arguments, examiner interviews, and report of actions to the client. Excludes any filings in response to Official Communications under TR430. Includes any affidavit, petition, extension, declaration and other requests for supervisory action that are not decided by a quasi-judicial or appellate tribunal within the Trademark Office. Note that governmental fees and external expenses (or "disbursements" in the US) are included under E100.

## UTBMS TRADEMARK BILLING CODES

Code	Identifier	Description
TR420	Preliminary Amendment - Domestic	All action associated with revising an application prior to the examination of the application on its merits in the home country of the applicant for an application filed under TR300, including preparation of amendments and revised drawings that does not materially alter the original drawing.
TR430	Official Communication - Domestic	All action associated with processing an Official Communication from a Trademark Office (known as an "Office Action" in the U.S. when directed toward the merits of the application) in the home country of an application for an application filed under TR300, including initial review and any calendaring ("docketing" in the U.S.) of any response deadline, report to client with any proposed response, review of applicant's instructions and comments, preparation of amendments and/or responsive arguments, examiner interviews, and report of actions to the client. Includes activities associated with Official Communications not affecting the merits of the application, such as reporting Notice of Allowance, receipt of Certificate of Registration, petitions, and other requests for supervisory action that are not decided by a quasi-judicial or appellate tribunal within the Trademark Office. Note that government fees and external expenses (or "disbursements" in the US) are included under E100.
T440	Quasi-Judicial Administrative Proceedings - Domestic	All action associated with completing a quasi-judicial proceeding before an administrative tribunal associated with the Trademark Office of the home country of the applicant in connection with an application filed under TR300, including Appeals, Oppositions, and other ex-parte and inter-parties proceedings. Includes collecting evidence, preparing and filing motions, briefs, responses, replies, surreplies, and other documents, attending conferences, depositions, hearings, and other proceedings. Does not include requests for supervisory action ("Petitions" in the U.S.) under TR430. Note that governmental fees and external expenses (or "disbursements" in the U.S.) are included under E100.
TR499	Other Trademark Prosecution - Domestic	Use only for trademark prosecution activities for applications that are to be initially filed in the ("domestic") home country or region of the applicant, and that can not be included under a previous code, or as instructed by the client.

## UTBMS TRADEMARK BILLING CODES

Code	Identifier	Description
<i>TR500 - International Trademark Application Preparation and Renewals</i>		
TR510	Application Preparation and Filing - International	All actions associated with completing a trademark, service mark or design mark application (including renewal applications) that is to be filed in a jurisdiction outside the home country or region of the applicant, including obtaining the power of attorney, translations if necessary, obtaining supporting information and documentation from the client, discussing priority filings with the client, drafting and revision of the application, preparation and filing of the application, and reporting the results to the client. This section includes all international national applications, regional applications (such as a CTM or Benelux application), and marks filed under WIPO (Madrid Agreement and Madrid Protocol). Note that government fees and external expenses (or "disbursements" in the U.S.) are included under E100.
TR599	Other International Trademark Application Preparation and Filing	Use only for international trademark application preparation activities that can not be included under a previous code or as instructed by the client.
<i>TR600 - International Trademark Prosecution and Renewal</i>		
TR610	Affidavits, Petitions, Extensions, Declarations and Other Filings - International	All action associated with processing affidavits, petitions, extensions, declarations, and change of correspondence with the Trademark Office in the home country of an application filed under TR500, including initial review and any calendaring ("docketing" in the U.S.) of any response deadline, report to client with any proposed response, review of applicant's instructions and comments, preparation of affidavits, petitions, extensions, declarations, change of address or change of ownership and/or responsive arguments, examiner interviews, and report of actions to the client. Excludes any filings in response to Official Communications under TR630. Includes any affidavit, petition, extension, declaration and other requests for supervisory action that are not decided by a quasi-judicial or appellate tribunal within the Trademark Office. Note that governmental fees and external expenses (or "disbursements" in the US) are included under E100.

## UTBMS TRADEMARK BILLING CODES

Code	Identifier	Description
TR620	Preliminary Amendment - International	All action associated with revising an application prior to the examination of the application on its merits in the home country of the applicant for an application filed under TR500, including preparation of amendments and revised drawings that does not materially alter the original drawing.
TR630	Official Communication - International	All action associated with processing an Official Communication from a Trademark Office outside the home country of the applicant in connection with an application filed under TR500, including initial review and calendaring of any response deadline, report to client with any proposed response, review of applicant's instructions and comments, preparation of amendments and/or responsive arguments, submitting response to local counsel, and report of actions to the client. Includes activities associated with Official Communications not affecting the merits of the application, such as receipt of Certificate of Registration, petitions, and other requests for supervisory action that are not decided by a quasi-judicial or appellate tribunal within the Trademark Office. Note that government fees and external expenses (or "disbursements" outside the US) are included under E100. Additionally, Appeals, Oppositions, and other such quasi-judicial proceedings before an administrative tribunal associated with the Trademark Office are included under TR640.
TR640	Quasi-Judicial Administrative Proceedings - International	All action associated with completing a quasi-judicial proceeding before an administrative tribunal associated with a Trademark Office outside of the home country of the applicant in connection with an application filed under TR500, including Appeals, Oppositions, and other ex-parte and inter-parties proceedings. Includes collecting evidence, preparing and filing motions, briefs, responses, replies, surreplies, and other documents, attending conferences, depositions, hearings, and other proceedings. Does not include requests for supervisory action under TR630. Note that governmental fees and external expenses (or "disbursements" outside the US) are included under E100.
TR699	Other Trademark Prosecution - International	Use only for trademark prosecution activities in connection with applications that are ("international") filed outside the home country or region of the applicant, and that can not be included under a previous code, or as instructed by the client.

*TR700 - Other Trademark Related Tasks*

## UTBMS TRADEMARK BILLING CODES

Code	Identifier	Description
TR710	Opinion Preparation	All actions associated with completing formal legal opinions on the validity, enforceability, infringement, and/or non-infringement of a trademark right, includes opinions on infringement of a client's trademark by a non-client infringer. Work of outside vendors in conducting searches or otherwise assisting investigation should be an expense under E100.
TR720	Portfolio Analysis and Management	All action associated with reviewing, analyzing, documenting, and managing a portfolio of trademarks. Includes trademark "due diligence" during transactional analysis.
TR730	Assignments and Security Interests	All actions associated with negotiating and preparing assignment (i.e. previously registered or filed application) or security interest, including review of file history, checking status and meeting with client. Work of outside vendors in conducting searches or otherwise assisting investigation should be an expense under E100.
TR740	Licensing	All actions associated with negotiating and preparing trademark license.
TR750	Domain Names - gTLDs	Domain Name Filing - Generic: All actions associated with completing a domain name application (including renewal) that is to be filed as a generic top-level domain (gTLD), e.g., .com. The domain name applications should be filed through the current domain name provider unless otherwise instructed.
TR760	Domain Names - ccTLDs	Domain Name Filing - Country Code. All actions associated with completing a domain name application (including renewal) that is to be filed as a country code top-level domain (ccTLD), e.g., .jp, .uk, .tv. The domain name applications should be filed through the current domain name provider unless otherwise instructed.

## UTBMS TRADEMARK BILLING CODES

Code	Identifier	Description
TR770	Quasi-Judicial Administrative Proceedings - Domain Names	All action associated with completing a quasi-judicial proceeding before an administrative tribunal associated with domain name enforcement actions, including Uniform Domain Name Dispute Resolution (UDRP) actions administered under ICANN and WIPO. Note that governmental fees and external expenses (or "disbursements") are included under E100. This code set is for quasi-judicial proceedings only, and any subsequent work completed in a contested matter (i.e. filing complaint or appeal to a national court of jurisdiction) would be expensed under general litigation codes.
TR799	Other Trademark Prosecution	Use only for other trademark related tasks that can not be included under a previous code, or as instructed by the client.

### *E100 - Expense Codes (from UTBMS Schedule)*

E101	Copying	Copying
E102	Outside Printing	Outside Printing
E103	Word Processing	Word Processing
E104	Facsimile	Facsimile
E105	Telephone	Telephone
E106	Online Research	Online Research
E107	Delivery Services/messengers	Delivery Services/messengers
E108	Postage	Postage
E109	Local Travel	Local Travel
E110	Out-of-town Travel	Out-of-town Travel
E111	Meals	Meals
E112	Court Fees	Court Fees
E113	Subpoena Fees	Subpoena Fees
E114	Witness Fees	Witness Fees
E115	Deposition transcripts	Deposition transcripts
E116	Trial Transcripts	Trial Transcripts
E117	Trial Exhibits	Trial Exhibits
E118	Litigation Support Vendors	Litigation Support Vendors

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<b>Code</b>	<b>Identifier</b>	<b>Description</b>
E119	Experts	Experts
E120	Private Investigators	Private Investigators
E121	Arbitrators/Mediators	Arbitrators/Mediators
E122	Local Counsel	Local Counsel

## UTBMS TRADEMARK BILLING CODES

Code	Identifier	Description
E123	Other Professionals	Other Professionals
E124	Other	Other
<i>E100 - New Intellectual Property Expense Codes</i>		
E125	Translation	Translation fees including preparation and keyboarding (typing) of documentation
E126	Drawings	Drawings prepared by external draftsman
E127	Patent and Trademarks Records	Including patent copies, priority documents, file histories and other intellectual property records obtained through third-party vendors;
E128	Searching and Monitoring	
E129	Official Patent Fees, excluding post-issuance maintenance, renewal fees and late fees	Official fees not otherwise identified above which are paid to governmental and quasi-governmental entities in connection with a pending application, including those paid to Patent and Trademark Offices, the World Intellectual Property, Notaries, consulates, and embassies.
E130	Post-Issuance Maintenance and Renewal Fees	Official fees paid to a government agency in order to maintain an issued patent or trademark in force
E131	Late Fees	Official surcharge fees paid to a government agency in order to have a document entered into the record past an initial deadline, including Petition for Extension of Time and Information Disclosure Statement fees in the U.S..