

## Annex 2b – Inter Partes Hearings checklist

This checklist is a step by step instruction on the process for arranging a Patents Inter Parte Substantive hearing. This should be completed in conjunction with the Inter Parte Hearing Arrangement Sheet and supported by the Patents Tribunal Manual and the desk instructions to enable the user to book a hearing.

# Inter Partes Hearing Checklist

*Please ensure that all relevant contacts are recorded via PDAX minutes or a contact log*

<b>Initial actions</b>	
The case officer will send the Inter Partes Hearing Arrangement Sheet to the PD Hearings mailbox with a request to arrange a hearing window in Abbey Orchard Street, London (AOS). The sheet will provide all the detail you require to start the arrangements including a suggested month for the hearing. The sheet can be located in SharePoint Tribunal Hearings/Patent Hearings/Hearings/Arrangement Sheets/Inter Parte Hearing Arrangement Sheet/	
The e-mail should contain a letter block for you to use when writing out to the parties.	
The case officer should have provided an indication of when they would like the Substantive Hearing to take place. Check in Outlook to see if a pre-booked week is available in (AOS). If not available book an Inter Partes week for the following month. Instructions for booking a window week can be found:- SharePoint/Tribunal Hearings/Patent Hearings/Hearings/Training Desk Notes/London Room Booking/ Check that the HO is available during that week using scheduling assistant on Outlook. Note on the appointment in Outlook that this is a Provisional Booking	
Issue the Hearing Window Letter to the parties providing details of the hearing window week booked. The letter can be located in SharePoint/Tribunal Hearings/Patent Hearings/Hearings/Letters/Hearing Window Letter/ Upload the letter to the PDAX dossier, using DOC CODE – LETTER IP and annotate as Hearing Window Letter.	
Diary the case for the end of the second evidence round for sequential and first evidence round for simultaneous, at which time the hearing clerk will finalise the arrangements. Set reminder in PD Hearings on Outlook.	
<b>Following evidence round</b>	
Liaise with the case officer that you can now send out the letter confirming the actual date of the hearing. This check is to ensure that the hearing window is still achievable.	
Check with the HO which date/s in the week they would prefer.	
Issue a letter to the parties with the confirmed dates and any specific instructions as provided by the Case Officer. The letter can be located in SharePoint/Tribunal Hearings/Patent Hearings/Hearings/Letters/Inter Partes Hearing Confirmation. Upload the letter to the PDAX dossier using DOC CODE – HRGIPCONF and annotate as Hearing arrangements letter.	
Book transcript writer if required - <a href="mailto:info@martenwalshcherer.com">info@martenwalshcherer.com</a>	
<b>2 weeks before</b>	
Confirm with the HO/CO that the duration of the hearing is suitable	
Check with the CO/parties whether there will be any witnesses for cross examination	
Check if a running order will be required, if so request one from the parties.	

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If the parties request same day transcripts, explain that they will be liable for extra costs and then make necessary arrangements.	
Check if any digital evidence will be used and confirm that we have the ability to play it.	
<b>7 days before</b>	
Check if skeleton arguments have been received.	
Check that a bundle for the HO has been received. Check if other bundles will be sent to the hearing location or to us.	
Check that precedents/authorities have been sent with the bundles.	
<b>2 days before</b>	
Check with HO if they need us to send anything to the hearing location and arrange if necessary.	
Send a confirmed list of attendees and any special instructions to the hearing location. Confirm receipt at the hearing location.	

*The purpose of this document is to act as a record between the office and an outside party where it is not felt necessary to record the contact on Pdax or on any of the arrangement sheets*

Contact Log	
Date	Details

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