



USPTO Financial Manager

Introduction to User Permissions

Updated July 2016

Overview

In April 2016, the USPTO released Financial Manager, a new online fee payment management tool. With Financial Manager, you can store electronic payment methods and assign user permissions, which allow other Financial Manager users to perform specific actions with your payment method. This guide will help you identify which permissions to assign users within your organization.

Administrators can...

Manage your stored payment method's administrative settings and permissions.

Funds Managers can...

Add, remove, and transfer deposit account funds.
(deposit accounts & EFTs only)

Fee Payers can...

Submit fee payments to the USPTO using your stored payment method.

Reporters can...

View and download reports and monthly statements for your stored payment method.

Financial Manager gives you the freedom to assign permissions in a manner that best **supports your business** process. For example, your legal administrators may be Fee Payers, while members of your accounting team may be Reporters. Each user may have **one or multiple permissions** for each stored payment method. You can also quickly **remove a user** and be confident that they no longer have access to your payment method.

Receive news and updates about Financial Manager—
send an email to fpng@uspto.gov to sign up for our email list today.



USPTO Financial Manager

Introduction to User Permissions

Cheat Sheet

	Administrator	Funds Manager	Fee Payer	Reporter
View basic information about the payment method	✓	✓	✓	✓
View administrative history for the payment method	✓			
Modify payment method details (e.g. billing address)	✓			
Close or delete the payment method	✓			
Grant and remove user permissions	✓			
Manage deposit account withdrawal destination options	✓			
View recent transactions	✓			✓
Withdraw funds from a deposit account via mailed check or EFT		✓		
Replenish a deposit account via EFT or transfer from another deposit account		✓		
Establish auto-replenishments for a deposit account via EFT		✓		
Pay fees using the stored payment method			✓	
Generate and download transaction reports				✓
View and download monthly statements				✓