

Ten Tips and Tricks for Navigating the USPTO's New Search Tool

Published: July 24, 2024



Lauriel Dalier

Sterne, Kessler, Goldstein &
Fox P.L.L.C.
Washington, D.C., USA
Trademark Office Practices
Committee



Catherine Farrelly

Frankfurt Kurnit Klein & Selz,
P.C.
New York, New York, USA
Trademark Office Practices
Committee



Ashley Krause

RE/MAX, LLC
Denver, Colorado, USA
Trademark Office Practices
Committee



Audrey Trace

Leason Ellis LLP
White Plains, New York, USA
Trademark Office Practices
Committee

The United States Patent and Trademark Office (USPTO) retired its longstanding search database on November 30, 2023, in favor of a new cloud-based search system. Attorneys and users from around the world have been scrambling to learn how to use the new system, which marks a stark departure from the old one, using entirely new search terms and syntax.

To assist INTA members with this transition, the USPTO provided members of the Trademark Office Practices Committee's U.S. Subcommittee with access to expert trainers to discuss the new search system in depth, for the purpose of compiling the following list of tips and tricks to help INTA members refine their search strategies and navigate this new landscape.

While the new search system allows simplified searching using options such as Wordmark or Owner from a drop-down menu, trademark practitioners generally will want to search in Expert Mode, using Field Tag and Search Builder. Although the search system default is to the General search, to avoid getting inefficient results, we advise practitioners not to search using the General search.

Seasoned practitioners comfortable with the idea of pattern matching may also choose to use Regex searching (that is, "regular expression" searching) to do more complex searches for variable criteria such as a search for phonetically identical marks spelled using different letters (for example, BLOC and BLOQ).

However, as we note below, searchers not as comfortable with Regex can instead search variations by simply typing in alternate spellings using Field Tag and Search Builder.

“ Although the search system default is to the General search, to avoid getting inefficient results, we advise practitioners not to search using the General search. ”

Below are our top 10 tips and tricks for effective and efficient searching.

1. Always use ALL CAPS for Field Tags and Connectors, and lower case for Search Terms

If you do not do this, the search may not work or the results may be wrong. For example, if you would like to see all live filings where the mark includes the word “lizard,” you would use the Field Tags CM:(combined mark) and LD: (live/dead) together with the connector AND, and write your search as follows:

CM:lizard AND LD:true

If you would like to see all live filings where the mark includes both “lizard” and “state,” you will have to use the CM Field Tag twice, for example:

CM:lizard AND CM:state AND LD:true

If you forget the second CM: Field Tag, the tool will search for the term “state” in every field.

New “Search Builder” Feature

Prompts for the Field Tag of interest are now available by clicking on Search Builder, only available when using Field Tag and Search Builder.

Start your search with your mark, for example, CM:lizard, and click Search Builder to see a:

1. Drop-down for the connectors AND OR (AND NOT is not there, and you will have to add “NOT” where needed);

2. Type to Select Field Tag window for finding the Field Tag of interest. Typing “class” immediately limits the list to the related Field Tag options, for example, CC Coordinated class, IC International class, PC Pseudo class; and
3. Search Text window by clicking on the Field Tag of interest in the window to the left. The Search Text window activates for you to type text. For example, if you choose “Coordinated class” in the window to the left, you can type “machine” in the Search Text window and you will be offered 007 Machinery. Once you have all your windows with the information you want, click the + Build button and the information is added to your search. To narrow searches, repeat this as often as needed.

2. Use the CM: Field Tag for Word Portion of Searches

When searching the word portion of marks, the CM: Field Tag is the most powerful and commonly used Field Tag, as it returns results that include pseudo marks and translation fields. For example, if you search CM:flower, the search results will also include marks that include foreign language translations of “flower,” for example, IN FIORE, which appears in the translation index as translating in English to “in flower.” To automatically include plurals in the search, use the **CM2:** Field Tag.

3. Use the Asterisk with Field Tags to Quickly Broaden or Filter Results

Apply the asterisk on either end or both ends of a search term *or* within the search term to broaden results:

- An asterisk on the right end of the term, for example, lizard*, retrieves marks comprised of “lizard” and any terms with additional letters/characters after the “d” such as “lizards” and “lizard**investors**”; and
- An asterisk on both ends of term, for example, *lizard*, retrieves marks comprised of “lizard” as well as marks with letters/characters before and/or after the term, for example, “drunklizard,” and “1lizarday.”

Use the asterisk as another true/false detector to narrow your search results:

- To find only registered marks, search RN:*
- To limit your search query to include only live published applications that are not yet registered, search (PO:* AND NOT RN:*) AND LD:true; and
- To exclude marks with design codes, add AND NOT DC:* to your search.

“ When searching the word portion of marks, the CM: Field Tag is the most powerful and commonly used Field Tag, as it returns results that include pseudo marks and translation fields. ”

4. Connectors Should Be Grouped Together by Type

When combining Field Tags, combine like connectors in parentheses to ensure that the tool processes them as a unit. For example, when you have more than one “AND” combined with another connector, keep “AND” connectors and the other connectors separate from each other by using parentheses:

(CM:snak* AND CC:009 AND LD:true) AND NOT GS:software

5. Use Square Brackets for Pattern-Matched Characters

To search for terms with aurally similar consonants or vowels, you have to use Regex searching, which requires placing the search term inside forward slashes. For this search, you should place the similar consonants/vowels inside square brackets, for example: [ckqX]. To include all vowels, make sure to include the letter “y,” for example: [aeiouy]. If you wanted to run a single search that would give you marks containing BLOCK, BLOC, BLOK, BLOQ, or BLOX, you could use this search:

CM: /blo[ckqX]/

6. Use Curly Brackets Around Numeric Ranges with Pattern Matches to Broaden/Limit Spelling Variations

When searching for pattern-matched characters, as in number 5 above, you can broaden or limit your search results by adding numeric ranges that identify the instances of the particular or varied consonants or a vowel that may appear. If you wanted to search for terms that begin with BLO and end with one or two of the letters C, K, Q, or X, you would search for the following:

CM:/blo[ckqX]{1,2}/

Note that the comma between the 1 and the 2 inside the curly brackets indicates that marks using at least one and up to two of those consonants should appear in the search results.

7. Use the **RG:*** Field Tag to Find Registrations with Claims of Acquired Distinctiveness

Use **RG:*** to find registrations with 2(f) claims as to the whole mark.

Use **RG:*** to find registrations with 2(f) claims as to part of the mark.

8. Use the **RD:** Field Tag to Search for Registrations with Particular Date(s) of Registration

To find marks that were registered as of a particular date, use the **RD:** Field Tag with dates or date ranges in square brackets.

To search for marks that were registered on April 15, 2024, use: **RD:[2024-04-15]**

To search marks that were registered in 2021, use: **RD:[2021-01-01 TO 2021-12-31]**

9. Order the Results

The new system returns results in an order that is based on a relevancy algorithm, rather than returning results based on filing date. To sort your results in reverse chronological order of filing, use the “Sort” column on the left side of the page, and select the button for “Serial (9-0).”

“ When combining Field Tags, combine like connectors in parentheses to ensure that the tool processes them as a unit. ”

10. Assess Results for Accurate Search Performance

Review your search results with a critical eye to ensure they reflect what you intended to search. While the new system includes many search features, it is not as sensitive to search syntax as the prior system. Consequently, it will not return an error message in many situations where the old search system would have, which makes it more difficult to immediately identify when your search contains a mistake.

For example, when a lowercase “and” appears in a search, the search will return results with the word “and” in any field, rather than applying “and” as a connector. So, if your search returns many more results than expected, make sure to confirm your connectors are not in lowercase text. Also, to help avoid unintended search results, reset your search each time to remove any applied filters by clicking on the reset button at the bottom of the filter/sort column on the left side of the page.

BONUS TIP!

Summary Page: If you miss the “summary page” you used to see in the Trademark Electronic Search System (TESS), you now have access to one. Simply log in to your USPTO.gov account and search in Expert Mode. When you select a mark in your results, it will open a new tab with the summary page, which you can save or print.

In addition to using the above tips and tricks, the search tool’s [Help Page on Trademark Search](#) provides a great deal of quick reference information and links to other materials. The USPTO’s handout, [Transitioning from TESS](#), is a very helpful reference guide to find familiar searches used in the old system and instructions for reformatting these searches for the new system. Lastly, practitioners should provide feedback to help the USPTO improve the system by using the Feedback button on the right side of the search screen.

Although every effort has been made to verify the accuracy of this article, readers are urged to check independently on matters of specific concern or interest.

© 2024 International Trademark Association

Topics

USPTO

United States



© 2024 International Trademark Association. All rights reserved. [Privacy Policy](#), [Cookies Policy](#), and [Terms of Use](#).