**Questions & Answers from the information sessions on 16 December 2020**

**GENERAL**

**Q: Would it be possible for you to share the power-point presentation with us after the session for later reference?**

A: The slides as well as the recording of the presentation will be shared on the website, along with this document with the answers to the questions posed by participants. See the [Documentation](https://www.qpip.org/documentation) page, under ‘Examination’

**Application process**

**Q: Under requirement to enroll, it was mentioned that we need to have a technical qualification. Can you please elaborate a little more on it, what qualifications will be considered to be eligible for the exam?**

A: Please refer to Rule 4.4 where both the technical fields as well as the qualifications are defined with further references given:

Rule 4.4 Minimum technical qualification requirement: At the time of applying for enrolment for the certification examination as indicated in RULE 5.1, the candidate must have:

4.4a At least a scientific, engineering or technical Bachelor Degree of three (3) year or four (4) year program duration in a technical field e.g. as included in any publicly available edition of the patent classification system that is administered by the World Intellectual Property Office, the European Patent Office, the United States Patent and Trademark Office, the Japan Patent Office or any other national patent office; or

4.4b At least a technical qualification in a technical field e.g. as included in any edition of any patent classification system as defined in RULE 4.4a wherein the technical qualification was conferred by a university, technical university, technical high school, vocational college, higher technical college or institute, school of engineering, or any similar establishment and the qualification is deemed equivalent to a Bachelor Degree by the Netherlands Organisation for International Cooperation in Higher Education; or

4.4c At least ten (10) years of experience working in a technical field as included in any edition of any patent classification system as defined in RULE 4.4a.

**Q: Regarding the requirement to enroll: will we get a confirmation that our experience is acceptable prior to the exam?**

A: Yes, you will. When the application is received, the Q&CPD Committee verifies the eligibility criteria. If they are fulfilled, the candidate will receive a confirmation e-mail and the invoice to pay the fee. Once the fee is received, the candidate will receive the confirmation of the enrolment. If there are any unclarities, the Q&CPD committee may ask for further documentation before deciding if the eligibility criteria have been met.

**Q: Can anyone apply to the exam or is there any regional preference for enrolment?**

A: Anyone fulfilling the requirements from anywhere in the world can register for the exam. That is why 5 different time zones have been set up and are available to sit the exam.

**Q: What does 3 years of work experience mean? 3 years experience in searching patent information?**

A: It means three years of work experience with at least 60% of that time spent on searching patent information or a combination of searching and mentoring or a combination of searching and outsourcing or a combination of searching and overseeing search work of others according to the definitions in Rule 4.2 in each and every year of the 3 year period preceding the date of application.

The basic idea is that you have been working as a patent information professional in the past 3 years, and don’t conduct patent searches as only a small part of your job.

**Q: How 'rigid' are the application criteria? Is it possible to give a try at the 2020 session even if not fulfilling these criteria of e.g. 3 years’ experience and 45 searches done?**

A: The application criteria are specified in Rule 4.2, 4.3 and 4.4. These are non-negotiable and they have been defined to allow enrolment of candidates who have a good chance to pass the exam. This is because setting up the whole examination process is a huge effort which is done by a small number of volunteers and therefore it is desirable to focus the limited resources available and avoid having to mark exams of candidates who just gave it a try. It is expected that the exams can only be passed with sufficient experience.

**Q: What kind of verification is needed for self-employed? In the US, business registration is not mandatory.**

A: You can provide us with any official document that demonstrates you are in business (e.g. tax receipts with any confidential details erased).

**Q: It might be difficult to get employment verification from previous employers. How do you suggest to proceed?**

A: To be able to sit the exam, it is required to have only THREE years of experience and at least a signed letter from your current employer. If it is impossible to get a signed letter from your previous employers, other documents can be provided such as work permits, pay slips (indicating your role), anything that can help demonstrating your activity as a patent information professional.

**Preparation**

**Q: Once the exam portal is ready, will there be some sample papers or similar so that the candidates can get a feel of the portal and the process?**

A: Since working on the exam questions will entirely happen on the candidate's own computer there is no special software / interface needed. You upload the results (in e.g. Word or Excel format) to the examination interface. The two parts with the theoretical questions will be conducted in the exam interface where the candidates will have to tick an answer in multiple choice questions, or type text in text boxes. As for examples of the case studies see the exam examples under [Documentation](https://www.qpip.org/documentation) and scroll down to “Examples of exam questions/case studies”.

**Q: Is there anyone we can contact before the exam, if we feel we need direction on how to answer any of the questions?**

A: Yes, you can always reach the ISBQPIP for guidance writing to [info@qpip.org](mailto:info@qpip.org) . You can also keep monitoring the QPIP website as material is being added regularly.

**Exam**

**Q: How is the online information gathered during the search?**

A: There is no information automatically gathered during the candidate’s search process. The marker’s decision to award marks will be based purely on the documentation that the candidate uploads at the end of each part of the exam. Candidate has to provide not only the history of their search(es) but also the reasoning for their decisions, e.g. which keywords, classes, concepts to include in or exclude from their search.

**Q: Is it an option to get a password to any commercial vendor during an exam?**

A: Yes, this can be arranged. However, ISBQPIP needs to be informed as soon as possible of your wish to be able to coordinate with vendors properly.

**Q: So should we upload results after each session in the exam (during the breaks)?**

A: You should upload results before the end of each session, i.e. before the session is closed (during the breaks it will not be possible anymore). Each part / session stands on its own. Search task / case study will only become available at the allotted time (e.g. 9:00 GMT+4) and will have to be completed AND uploaded back to the website within the given time frame. Candidates should take care to upload their results files early, even uploading different versions if they want to be extra careful.

Q: **By questions answered on the website, do you mean the two theory exams? So we cannot return to these questions after the allocated time has passed - e.g. have a rigid 30 min for the general theory exam, and cannot go back to these at the end?**

A: The questions of both theory exams should not be downloaded but answered directly through the website’s interface. They will be either multiple choice or open questions. They have to be completed in the exact time frame while they are accessible. Within the given time frame, the candidate can go back to previously answered or skipped questions.

**Q: Can we leave the room to get documents from the printer?**

A: Yes, you can step out of the room. You can take a break, if you wish, but the clock will continue ticking.

**Q: Will there be any support available during the exam in case of any technical glitch?**

A: Yes, there will be support available.

**Landscaping**

**Q: Are there going to be any patent landscaping examples added to the website?**

A: There are no examples, as patent landscaping was not part of the mock exams, but there is a quite detailed description of what candidates can expect for the patent landscaping exam:

a technology-neutral case to test patent landscaping skills. Candidates will be given a collection of patent data (about 1000 in several hundred patent families) and asked to provide some or all of the following:

* A standardized assignee list
* An example of a patent family reduction
* At least three categories within the collection
* Charts of publications over time
* Charts of publications by category over time
* Charts of the top assignees
* Assignee trends over time
* Assignee analysis over the categories created
* An example of semi-automated technology clustering
* An example of citation analysis

**Q: Are all databases allowed to be used, including analysis modules for graphing?**

A: The landscaping exam will not ask for any specific graphs, diagrams or maps in the case studies that can only be produced with special software, but some analysis tools could be helpful (see previous question for the type of graphs that may be asked). Information on suitable tools will be added to the website.

**Marking**

**Q: What is the marking of the case studies based on.**

A: The marker’s decision to award marks will be based purely on the documentation that the candidate uploads at the end of each part of the exam. For the search case studies, candidates have to provide not only the history of their search(es) but also the reasoning for their decisions, e.g. which keywords, classes, concepts to include in or exclude from their search. Since there is not one way to conduct a search, explanation of the design of the search strategy is crucial to obtain marks. Candidates will not pass by only providing some relevant records. Also, for the analysis case studies, candidates have to provide explanations.

**Q: Regarding the marking, what is the weight of each category?**

A: Each part is marked on its own. The candidate has to obtain 55% or more of the maximum number of points for each part in order to pass. There will be no compensation between parts. Only the team responsible for the patent landscaping parts have not decided yet what the pass criteria will be exactly.

If candidates fail for parts, they can re-sit those parts at the next exam opportunity.

**After the exam**

**Q: Do you already know when the next examinations will be? 2022?**

The statutes require an exam to take place AT LEAST every two years. Whether there will be one in 2022 will depend on demand and resources (and the outcome of the one in 2021).

**Q: Once a person passes the examination, what are the details provided to him/her with the certificate? Will any additional details be shared with the employer upon request?**

A: The candidates who pass the examination will receive a pass/fail note and the actual percentage of points scored (e.g. 60%, 55% etc) for each of the exam parts. This information will be shared with the candidate only and no-one else.

**Q: Once qualified, there are annual fees to be paid - if you miss a year (for any reason), can you just pay to re-join, or do you lose QPIP status until you sit the exam again?**

A: To maintain the QPIP status it is necessary to pay the yearly fee. QPIPs receive email notification when renewal payment is due. If the QPIP, after repeated reminders, still fails to pay (or to get in contact with the ISBQPIP explaining eventual issues), s/he loses the QPIP status and needs to sit the exam again. Full details are provided in Rules 22.4, 22.5, 22.6, 22.7.

**Q: Will there be a list of training or conferences to attend every year to maintain the qualification?**

A: In general, any training or conference related to IP and patent information is eligible to earn CPD points. There is a detailed list of activities in addition to attending relevant conferences / training that allow a QPIP to earn the needed CPD points to maintain the QPIP status. Those activities are described and listed in Rule 23.7 and include, for example, reading books, acting as peer review referee, authoring an article etc.