

**STEP 1: Invention Disclosure (ID)**  
as prelude to  
**STEP 2 a Utility Compliant Disclosure (UCD)**  
**The secret to understanding the Schwartz Method TSM**  
**for forming Utility Compliant Invention Disclosures**

1. Start your process with a STEP 1 simple Invention Disclosure (ID) document. Create this and version it with the date of conception. Use it to convince yourself and others on your team that there could be a patentable preferred-embodiment for your invention. See STEP 1 table with typical ID information.

THIS ID is not a viable document to ensure a patent application can be drafted that will have true sustainable competitive advantage. Blindly submitting this type of document to counsel too early in your development process is a recipe for disaster. Submitting this type of document too late in your process will put you at risk of violating the 1 year rule along with the loss of international filing rights.

2. Continue your engineering and development process with STEP 2, a well structured “invention disclosure patent application workbook document (IDPAW)”. This is an ID on steroids. Why? Because it belies the fundamental elements that must be included in a down stream patent application (provisional or non-provisional.). Knowing WHY these elements must be included and tied together BEFORE communicating with outside counsel for refining claims is key to getting your patent application right first time and filed first.

Complete STEP 2 by using your best and final IDPAW to generate a Utility Compliant Disclosure UCD-the preferred document for communicating with outside counsel.

HOW: Get the eBook, paper back, or Hard Cover and make TSM your guiding principles and universal patenting language to (a) quickly digest the MPEP rules applying to utility patents, explained by Schwartz in laymen’s terms (b) learn and understand The Schwartz Method for forming utility compliant invention disclosures and save 70% of your total patent expense for drafting, filing, and prosecution.

<https://store.bookbaby.com/book/utility-patenting-for-ip-savvys>

## **STEP 1: Provide this information in your first invention disclosure.**

1. Title of invention.
2. List the developers, including name, employer, mailing address, e-mail address, telephone number, and citizenship.
3. Was the invention developed/financed using any government funds? If yes, identify the government contract/grant number.
4. Describe the problem solved by the invention.
5. Identify efforts by other parties directed at solving this problem. Include a list of any relevant publications. Attach any prior art searches.
6. When was the invention first conceived?
7. Do you have a written record of the development of the invention? If yes, identify the location and indicate the date of the first entry.
8. Have you commercialized or attempted to commercialize the invention? If yes, describe the circumstances.
9. Has the invention been disclosed to anyone? If yes, list all prior publications and disclosures of the invention to third parties, including the date and the circumstances of the disclosure. Also indicate if a confidentiality agreement covered the disclosure.
10. Do you have a working model of the invention?
11. If it would aid in understanding the invention, attach a drawing.
12. Describe the invention in outline form, including the unexpected result.

## **STEP 2: Learn and apply The Schwartz Method (TSM) for final ID preparation**

Get a copy of the eBook: Utility Patenting for IP SAVVYS in order to learn the secret to forming a utility compliant invention disclosure for communication with patent counsel. Don't blindly submit the STEP 1 document and hope for the best. Know what's behind a patent that will publish with sustainable competitive advantage in order to better form your preferred Invention Disclosure as a Utility Compliant Disclosure. Copy and paste the BookBaby store link to get your Schwartz TSM approach to forming a Utility Compliant Disclosure. <https://store.bookbaby.com/book/utility-patenting-for-ip-savvys>

### **Other important readings:**

“Make money on your invention”-Brian Fried, “Put a Lock on It”-Sean Detweiler