

FILED

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In Pro Se

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CLERK U.S. DISTRICT COURT  
CENTRAL DISTRICT OF CALIF.  
LOS ANGELES  
*[Signature]*

UNITED STATES DISTRICT COURT  
CENTRAL DISTRICT OF CALIFORNIA  
*FIRST AMENDED*

Morris Reese,	)	<b>COMPLAINT FOR</b>
	)	<b>PATENT INFRINGEMENT</b>
Plaintiff	)	
	)	CV11-01934 SJO (JEMx)
Vs.	)	
	)	
Verizon California, Inc., and	)	<b>DEMAND FOR JURY</b>
AT&T California,	)	<b>TRIAL</b>
	)	
Defendants	)	

*FIRST AMENDED*

**PLAINTIFF'S FIRST AMENDED COMPLAINT**

Plaintiff, Morris Reese ("Plaintiff"), files this First Amended Complaint against Defendants, Verizon California, Inc., and AT&T California, and alleges as follows:

**THE PARTIES**

1. Plaintiff is an individual residing in Westlake Village, California.
2. Verizon California, Inc., which is a subsidiary of Verizon Communications, Inc., is doing business in California and, on

ORIGINAL

information and belief, has a principal place of business at 112 South Lakeview Canyon Rd., CA501GC, Thousand Oaks, CA 91359.

3. AT&T California, which is a subsidiary of AT&T, Inc., is doing business in California and, on information and belief, has a principal place of business at 525 Market Street, 18<sup>th</sup> Flr., San Francisco, CA 94105.

### **JURISDICTION & VENUE**

4. This is an action for infringement of at least one United States patent. Accordingly, this action arises under the patent laws of the United States of America, 35 U.S.C. Section 1 et. Seq., and jurisdiction is properly based on Title 35 United States Code, particularly Section 271, and title 28 United States Code, particularly Section 1338(a).
5. Verizon California, Inc., upon information and belief, transacts business in this judicial district by providing a telephone service called Call Waiting ID which uses the method described and claimed in United States Patent No. 6,868,150 (“the ‘150 patent”), the patent at issue in this lawsuit, and by conducting other business in this judicial district.
6. AT&T California, upon information and belief, transacts business in this judicial district by providing a telephone service called Call Waiting ID which uses the method described and claimed in United States Patent No.

6,868,150 (“the ‘150 patent”), the patent at issue in this lawsuit, and by conducting other business in this judicial district.

7. Venue is proper in this court under Title 28 U.S.C. Sections 1391(b) and 1400(b).

### **PATENT INFRINGEMENT COUNT**

8. On March 15, 2005, the ‘150 patent, entitled “Method for Use With Caller ID System,” was issued to Morris Reese. A true and correct copy of the ‘150 patent is attached as Exhibit A.
9. Pursuant to 35 U.S.C. Section 282, the ‘150 patent is presumed valid.
10. Plaintiff, Morris Reese, is the owner and sole inventor of the ‘150 patent.
11. Claims 23 and 32 of the ‘150 patent are directed toward a “method for sending to a first party who subscribes to a Custom Local Area Signaling System (CLASS) service including Caller Identification (Caller ID) and who is already engaged in a telephone conversation with a second party a call waiting tone signal indicating an incoming call from a third party responsively to receiving at a terminating central office of the first party the third party directory telephone number flagged as private from an originating central office of the third party indicating that the received

directory telephone number of the third party is not to be disclosed at the first party called station.”

12. Verizon California, Inc., on information and belief, provides local telephone services to millions of customers in California.
13. AT&T California, on information and belief, provides local telephone services to millions of customers in California.
14. On information and belief, Verizon California, Inc's., wireline telephone service offers to its customers a service called Call Waiting ID, which sends to a called party who is already engaged in a conversation with another party a call waiting tone signal only indicating an incoming call from a call waiting caller responsively to receiving at terminating central office equipment serving the called party the call waiting caller directory telephone number flagged as private from originating central office equipment serving the call waiting caller indicating that the received directory telephone number of the call waiting caller is not to be disclosed to the called party.
15. On information and belief, AT&T California wireline telephone service offers to its customers a service called Call Waiting ID, which sends to a called party who is already engaged in a conversation with another party a call waiting tone signal only indicating an incoming call from a call

waiting caller responsively to receiving at terminating central office equipment serving the called party the call waiting caller directory telephone number flagged as private from originating central office equipment serving the call waiting caller indicating that the received directory telephone number of the call waiting caller is not to be disclosed to the called party.

16. Verizon California, Inc., on information and belief, provide services that infringe at least claims 23 and 32 of the '150 patent, including for example and without limitation Verizon California's wireline telephone services offering of Call Waiting ID, as well as any other telephone services performed in the manner described and claimed in the '150 patent.
17. AT&T California, on information and belief, provide services that infringe at least claims 23 and 32 of the '150 patent, including for example and without limitation AT&T's wireline telephone services offering of Call Waiting ID, as well as any other telephone services performed in the manner and described in the '150 patent.
18. Plaintiff provided notice to Verizon California, Inc., of its alleged infringement through its parent holding company, Verizon

Communications, Inc., on April 13, 2005. See attached letter at Exhibit B.

19. Plaintiff provided notice to AT&T California of its alleged infringement through its former parent holding company, SBC Communications, Inc., which is now known as AT&T, Inc., on April 13, 2005. See attached letter at Exhibit C.
20. The infringement alleged above has injured Plaintiff and thus he is entitled to recover damages adequate to compensate for the infringement, which in no event can be less than a reasonable royalty.
21. Due to Verizon California, Inc's., infringement of the '150 patent, Plaintiff is entitled to a reasonable royalty based on at least all revenues received by Verizon California, Inc. from subscribers to the combination of its Call Waiting and Caller ID services.
22. Due to AT&T California infringement of the '150 patent, Plaintiff is entitled to a reasonable royalty based on at least all revenues received by AT&T California from subscribers to the combination of its Call Waiting and Caller ID services.

**DEMAND FOR JURY TRIAL**

23. Plaintiff hereby demands a jury trial on all claims and issues.

**PRAYER FOR RELIEF**

Wherefore, Plaintiff prays for entry of judgment:

- A. that Defendant, Verizon California, Inc., has infringed one or more claims of the '150 patent;
- B. that Defendant, AT&T California, has infringed one or more claims of the '150 patent
- C. that Defendant, Verizon California, Inc., account for and pay to Plaintiff all damages caused by the infringement of the '150 patent, which by statute can be no less than a reasonable royalty;
- D. that Defendant, AT&T California, account for and pay to Plaintiff all damages caused by the infringement of the '150 patent, which by statute can be no less than a reasonable royalty;
- E. that Plaintiff be granted pre-judgment and post-judgment interest on the damages caused to him by reasons of Defendants' infringement of the '150 patent;
- F. that Plaintiff be granted his attorneys' fees in this action;
- G. that costs be awarded to Plaintiff; and

H. that Plaintiff be granted such other and further relief as the Court  
may deem just and proper under the current circumstances.

Respectfully submitted,

Date: 3-30-2011

A handwritten signature in cursive script, appearing to read "Morris Reese", written over a horizontal line.

Morris Reese  
1134 Country Valley Road  
Westlake Village, CA 91362



# EXHIBIT A



US006868150B1

(12) **United States Patent**  
**Reese**

(10) **Patent No.:** **US 6,868,150 B1**  
(45) **Date of Patent:** **\*Mar. 15, 2005**

(54) **METHOD FOR USE WITH CALLER ID SYSTEM**

**FOREIGN PATENT DOCUMENTS**

(76) **Inventor:** **Morris Reese, P.O. Box 6651, Thousand Oaks, CA (US) 91359**

JP	0039154	3/1983
JP	56-13665	7/1983
JP	0059854	4/1985

(List continued on next page.)

(\* ) **Notice:** Subject to any disclaimer, the term of this patent is extended or adjusted under 35 U.S.C. 154(b) by 215 days.

**OTHER PUBLICATIONS**

This patent is subject to a terminal disclaimer.

Belcore Technical Reference TR-TSY-000031, Issue 1, Jun. 1986, "Calling Number Delivery".  
Belcore Technical Advisory TA-NWT-000030, Issue 2, Sep. 1991, "CPE Data Transmitter Requirements".

(List continued on next page.)

(21) **Appl. No.:** **10/160,769**

*Primary Examiner*---Benny Q. Tieu

(22) **Filed:** **Jun. 3, 2002**

(57) **ABSTRACT**

**Related U.S. Application Data**

(63) Continuation of application No. 08/614,188, filed on Mar. 13, 1996, now Pat. No. 6,427,009, which is a continuation of application No. 08/093,603, filed on Jul. 19, 1993, now abandoned, which is a continuation of application No. 07/691,492, filed on Apr. 25, 1991, now abandoned, which is a continuation-in-part of application No. 07/460,381, filed on Jan. 3, 1990, now abandoned.

An apparatus and method are disclosed for accessing telephone or cellular originating central office equipment to control the disclosure of a calling party directory telephone number or, if applicable or available, directory telephone number and name to a called party who subscribes to a Custom Local Area Signaling System (CLASS) service including Caller Identification (Caller ID), which discloses the calling party directory telephone number or directory telephone number and name to the called party, by performing a desired one of a plurality of automatic and/or manual operations. Method is disclosed for connecting to a called station idle or busy telephone line with ringing signals or a call-waiting tone signal and then transmitting the calling party directory telephone number or, if applicable or available, directory telephone number and name to the called station during a silent interval between the ringing signals or after the call-waiting tone signal responsively to receiving the calling party directory telephone number flagged as public from originating central office equipment of the calling party indicating that the directory telephone number or the directory telephone number and name are to be disclosed at the called station.

(51) **Int. Cl.<sup>7</sup>** ..... **H04M 3/42; H04M 1/56; H04M 15/06**  
(52) **U.S. Cl.** ..... **379/215.01; 379/142.08; 379/201.11; 379/207.04**  
(58) **Field of Search** ..... **379/215.01, 142.01, 379/142.04, 142.05, 142.06, 142.08, 201.01, 201.11, 201.02, 201.12, 207.02, 207.04, 207.05, 207.06, 207.07, 210.02, 210.03, 211.01, 211.02**

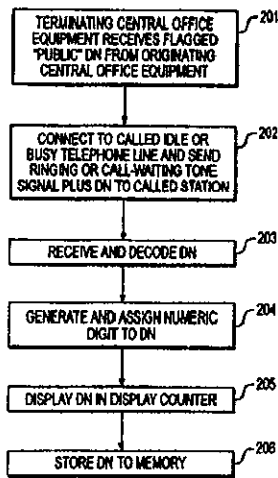
(56) **References Cited**

**U.S. PATENT DOCUMENTS**

4,277,649 A *	7/1981	Sheinbein	.....	379/211.02
4,332,985 A	6/1982	Samuel	.....	379/353
4,447,676 A	5/1984	Harris et al.	.....	379/199

(List continued on next page.)

**49 Claims, 4 Drawing Sheets**



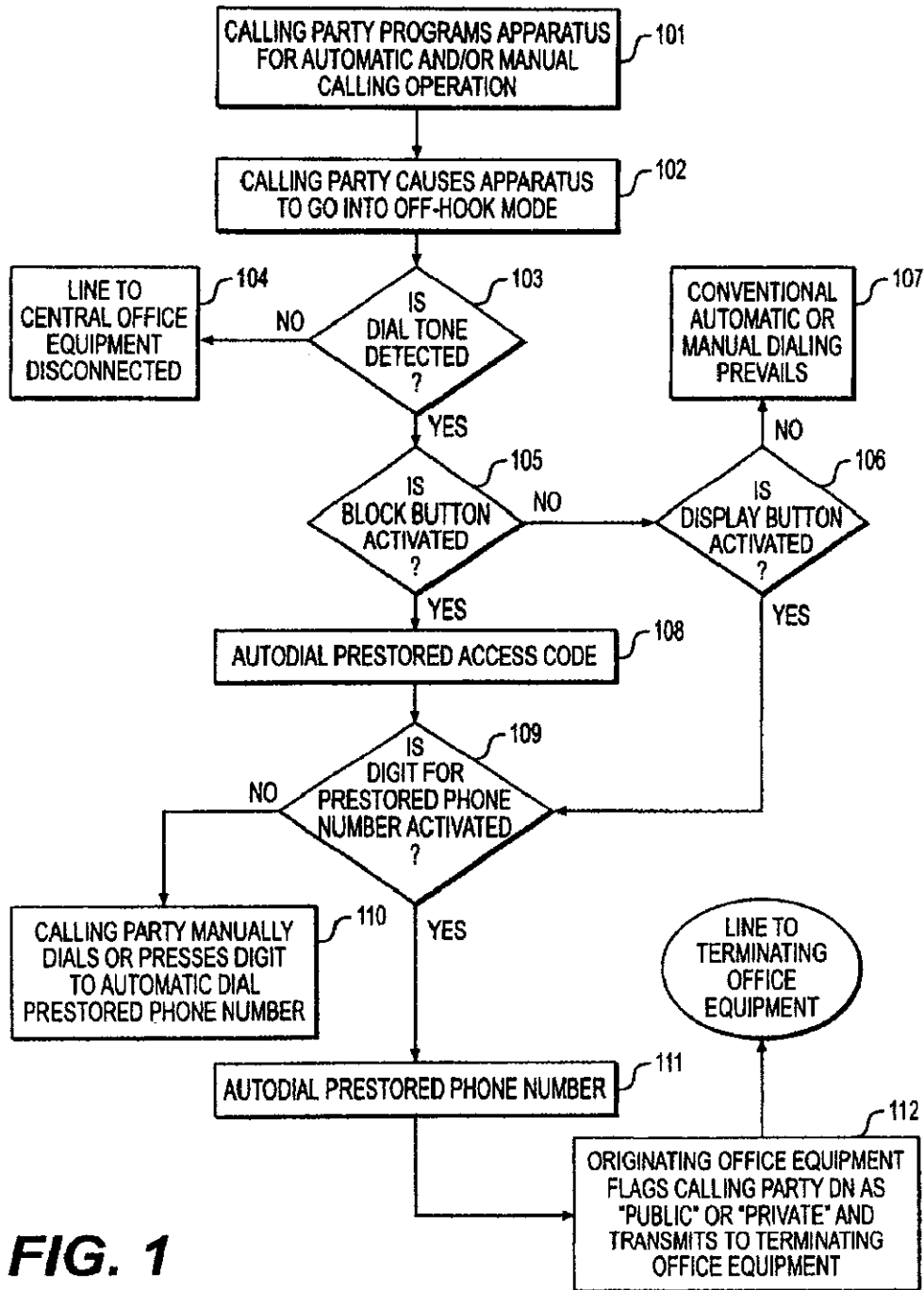
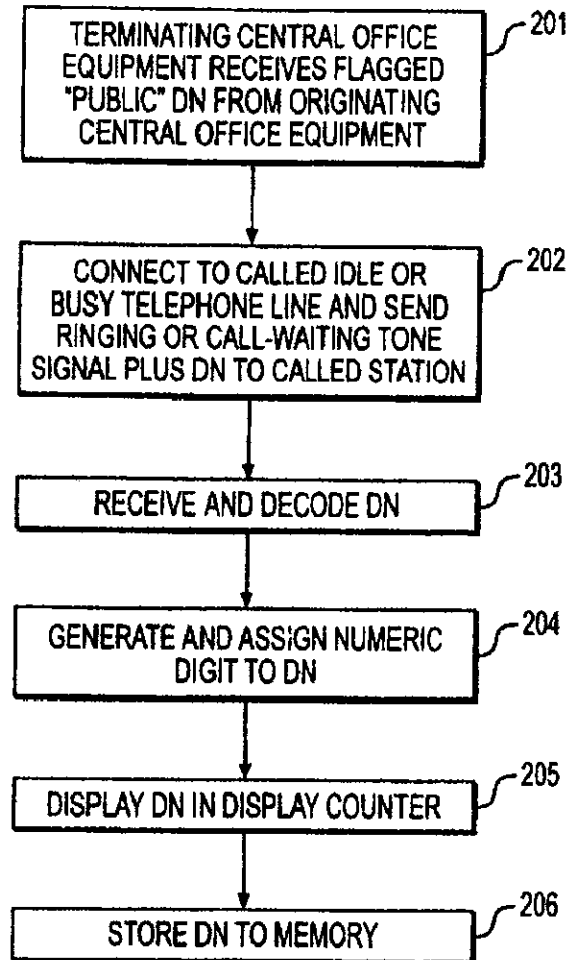
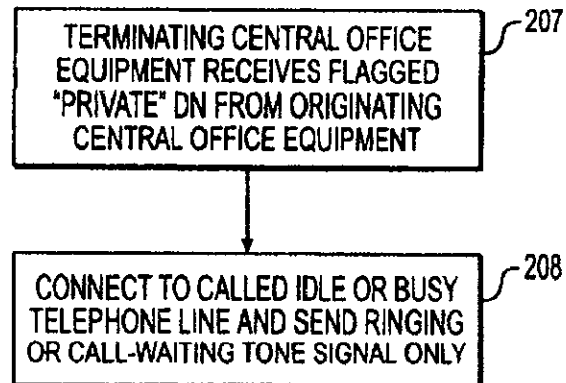


FIG. 1

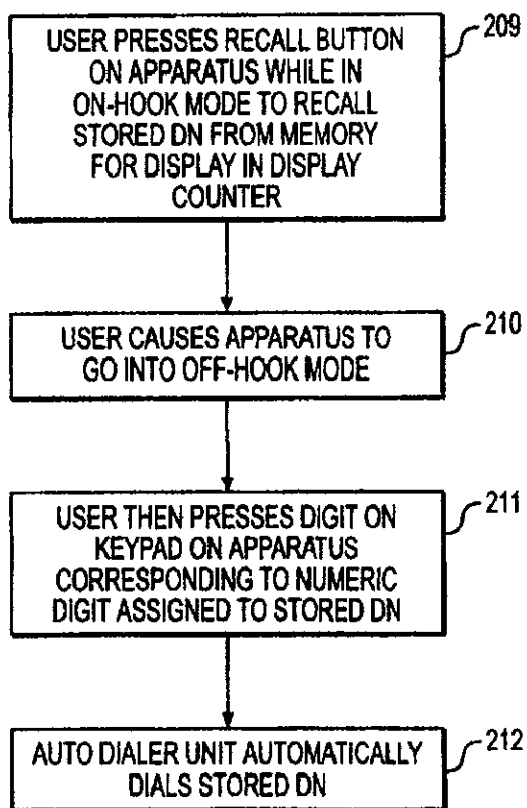
**FIG. 2**

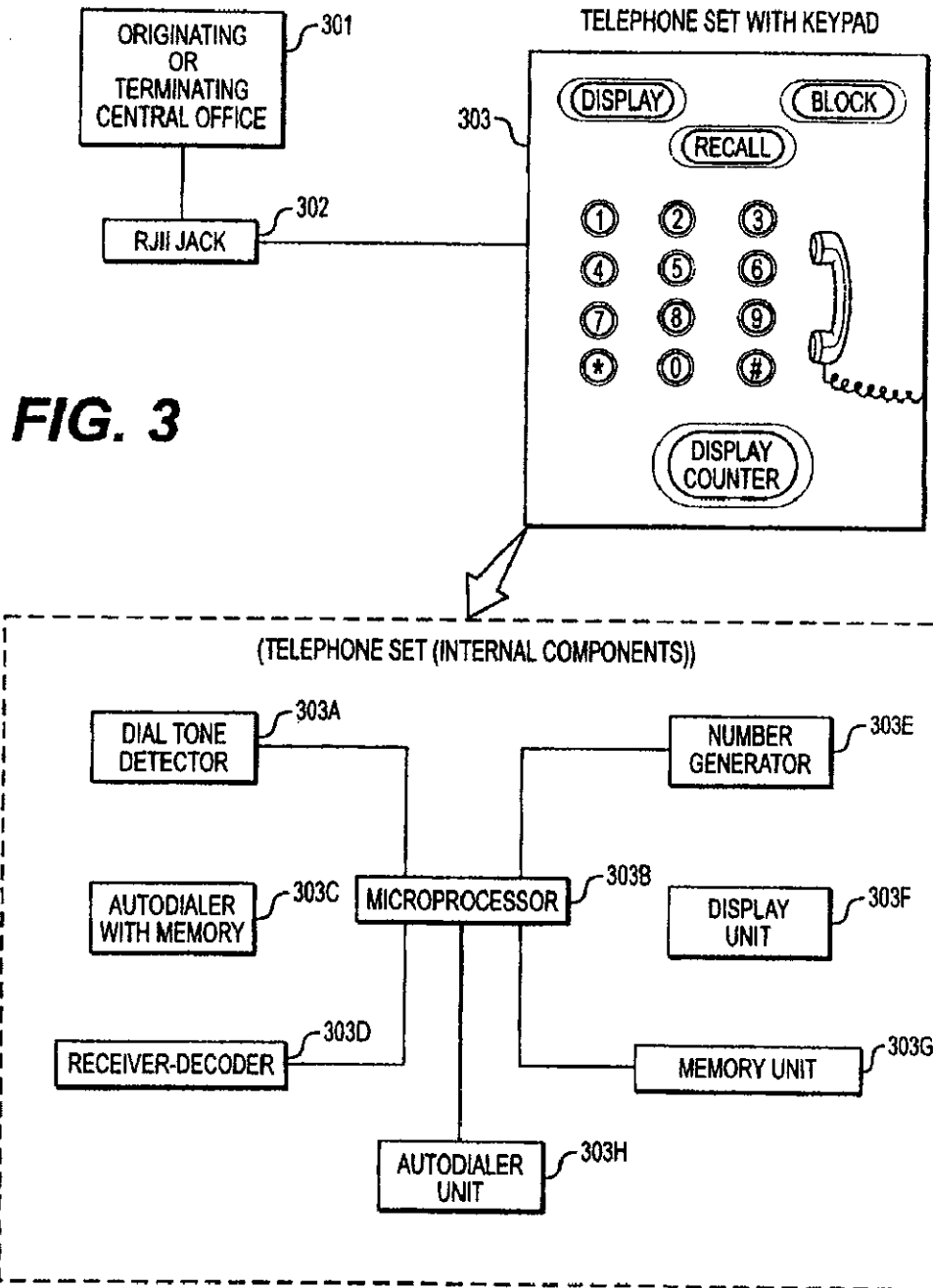


**FIG. 2A**



**FIG. 2B**





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## METHOD FOR USE WITH CALLER ID SYSTEM

This is a continuation under 37 CFR 1.53 (b) (1) of pending prior art application Ser. No. 08/614,188, filed on March 13, 1996 now U.S. Pat. No. 6,427,004 of MORRIS REESE, which is a continuation of application Ser. No. 08/093,603, filed Jul. 19, 1993 (abandoned), which is a continuation of application Ser. No. 07/691,492, filed on Apr. 25, 1991 (abandoned), which is a continuation-in-part of application Ser. No. 07/460,381, filed on Jan. 3, 1990 (abandoned).

### BACKGROUND OF THE INVENTION

#### 1. Field of the Invention

This invention relates to an apparatus, such as a pushbutton telephone or other receiving and sending equipment, for use in accessing telephone or cellular company originating central office equipment so as to allow a calling party to control the disclosure of its directory telephone number and/or name (hereinafter sometimes referred to as "directory telephone number with a corresponding name" or "DN") to a called party who subscribes to any of the Custom Local Area Signaling System (CLASS) services such as Caller ID, Automatic Recall, Who Called Me, Automatic Callback and Screening List, to name a few. The apparatus is also for use in receiving a directory telephone number and/or name of a calling third party from telephone or cellular company terminating central office equipment, displaying the received directory telephone number and/or name in a display counter, and storing the received directory telephone number and/or name in memory for later recall by the called party. In addition, the apparatus is for use in permitting the automatic or manual dialing of the stored directory telephone number to return a call. This invention also relates to a method for sending a directory telephone number and/or name of a calling party to a called station during a silent interval between ringing signals or following a call waiting tone signal after receiving at terminating central office equipment serving the called station the calling party's directory telephone number flagged as public from originating central office equipment serving the calling party, indicating that the received directory telephone number or, if applicable, directory telephone number and name of the calling party is to be disclosed at the called station.

#### 2. Description of the Prior Art

Several Regional Bell Operating Companies are offering or planning to offer their customers Caller ID on a subscription basis. This new service discloses the calling party directory telephone number to the called party during the first long interval between ringing signals from a telephone switching office. Due to privacy considerations, most state public utility commissions are requiring their local telephone companies to offer Caller ID along with a blocking service, and for free, so as to allow the calling party to decide on a per call basis whether to disclose or block its directory telephone number to the called party. One blocking service being offered or considered by the Regional Bell Operating Companies require the calling party to dial an access code prior to and as part of the calling sequence in order to override the calling party permanent "public" status of its directory telephone number and temporarily flag the directory telephone number as "private" to indicate to the terminating central office equipment that the directory telephone number is not to be disclosed to the called party. If the access code is dialed as part of the calling sequence, the directory

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telephone number will be disclosed to the called party. In either case, the originating central office equipment transmits the flagged "public" or "private" directory telephone number to the terminating central office equipment to which the called party telephone line is connected during call setup. If the directory telephone number is flagged "private", the terminating central office equipment connects to the called party telephone line with ringing only. However, if the directory telephone number is flagged "public", the terminating central office equipment connects to the called party telephone line with ringing and the transmission of the calling party's directory telephone number.

The invention disclosed in the Carolyn A. Doughty U.S. Pat. No. 4,582,956, issued Apr. 15, 1986, discloses a method and an apparatus for displaying at a selected station special service information during a silent interval between ringing signals from a telephone switching office. Each received character of the special service information is "temporarily stored" in a data memory of a data receiver by a program-controlled microprocessor and then exhibited in a display unit under the control of the microprocessor. The display is thus initiated during the silent interval and remains until cleared, automatically, when the called party answers the incoming call or when the calling party hangs up. Thus, in either situation, the special service information is retained in memory at the terminating central office switch and not in a memory at the called party apparatus.

### SUMMARY OF THE INVENTION

The foregoing problems are solved and a technical advance is achieved by method and apparatus for accessing telephone or cellular company originating central office equipment so as to control the disclosure of a calling party's DN to a called party who subscribes to Caller ID or to any of the previously mentioned CLASS services by performing different automatic calling operations. Another technical advance is achieved by method and apparatus for receiving, displaying and storing to memory a calling party's DN sent from telephone or cellular company terminating central office equipment responsively to the calling party's flagged "public" DN received to the terminating central office equipment from originating central office equipment to which the calling party telephone line is connected. A receiver-decoder connected to a called party apparatus (telephone set or separate stand alone unit) receives and decodes signals representing the calling party's DN sent from the terminating central office equipment. A number generator connected to the apparatus generates and assigns a numeric digit(s) to each DN received to the receiver-decoder. An alphanumeric display unit connected to the apparatus displays the received DN in an LED or LCD display counter. A memory unit of the apparatus stores the received DN and the generated digit(s) to memory for later recall and display. Method and apparatus for recalling a stored DN from memory for visual display in a display counter, and for automatically or manually dialing the stored DN to return a missed call achieve still another technical advance. For example, assuming that the called party missed the incoming call and decides to return the missed call, the called party presses a recall button on the apparatus to recall the stored DN from memory for display in the LED or LCD display counter. The called party then causes the apparatus to go into an off-hook mode so as to receive dial tone from central office equipment and then presses the digit(s) assigned to the stored DN on a keypad on the apparatus, thus an autodialer unit connected to the apparatus automatically dials the stored DN.

Still yet another technical advance is achieved by method for sending to a called station during a silent interval of a

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ringing signal cycle or a call-waiting tone signal cycle a calling party's DN from terminating central office equipment responsively to the receipt of the DN from originating central office equipment indicating that the DN is to be disclosed at the called station. For example, the terminating central office equipment responds to the receipt of the calling party's "public" DN from the originating central office equipment by connecting to a voice channel of the called party busy or idle telephone line with a ringing signal or a call-waiting tone signal and then sending the DN to an apparatus at the called station during a silent interval of the ringing signal cycle or the call-waiting tone signal cycle.

In accordance with the teaching of this invention I provide a calling party with a programmable apparatus and methods of accessing telephone or cellular company originating central office equipment so as to control the disclosure of the calling party DN to a called party who subscribes to Caller ID or to any of the other CLASS services by performing different automatic calling operations. I also provide the called party with the programmable apparatus for use in receiving, displaying and storing to memory the calling party's DN sent from telephone or cellular company terminating central office equipment.

In one operation of this invention, i.e. in FIG. 1, the calling party programs the apparatus prior to going off-hook to perform a desired automatic calling operation by pressing either a display button or a block button on the apparatus, in addition to pressing a desired digit on the apparatus keypad corresponding to a stored phone number of a person to be contacted. The desired automatic calling operation begins when the calling party causes the apparatus to go into an off-hook mode. The telephone or cellular company originating central office equipment to which the calling party telephone line is connected detects the off-hook condition on the telephone line and sends dial tone. A dial tone detector of the apparatus detects the dial tone while a microprocessor of the apparatus, which is responsive to the detection of the dial tone, determines whether the display button or the block button has been activated. If neither the display button nor the block button has been activated, conventional automatic or manual dialing of the stored phone number or any other phone number prevails. Assuming that the display button and the digit corresponding to the stored phone number of the person to be contacted have, indeed, been activated, an autodialer with memory unit of the apparatus automatically dials the stored phone number. The originating central office equipment responds to the autodialed phone number by temporarily flagging the calling party permanent stored DN as "public" and automatically transmitting the flagged "public" DN to the terminating central office equipment to which the called party telephone line is connected. The terminating central office equipment responds to the receipt of the flagged "public" DN from the originating central office equipment by connecting to the called party busy or idle telephone line with ringing signals or a call-waiting tone signal and transmitting the DN to the called party apparatus during a silent interval between the ringing signals or following the call-waiting tone signal. The apparatus receives the DN, generates and assigns a numeric digit to the received DN, displays the received DN in an LED or LCD display counter and stores the received DN to memory so as to allow the called party to later recall the stored DN from the memory for display and automatic or manual dialing of the stored DN to return a missed call.

In another operation of this invention, if it is determined that the block button has been activated, the autodialer with memory unit of the apparatus automatically dials a prestored

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access code. The access code instructs the originating central office equipment, to which the calling party is connected, to temporarily flag the calling party permanent stored DN as "private". In continuance, the microprocessor of the apparatus immediately makes a decision to determine whether the digit corresponding to the stored phone number of the person to be contacted has been activated. Assuming that the digit has been activated, the autodialer with memory unit, which is now in a pause mode, automatically dials the stored phone number. The originating central office equipment responds to the receipt of the autodialed phone number by temporarily flagging the calling party permanent stored DN as "private" and automatically transmitting the flagged "private" DN to the terminating central office equipment to which the called party telephone line is connected. The terminating central office equipment responds to the receipt of the flagged "private" DN from the originating central office equipment by connecting to the called party idle telephone line and transmitting ringing signals only, or by connecting to the called party busy telephone line and transmitting a call-waiting tone signal only.

In still another operation of this invention, if it is determined that neither the display button nor the block button has been activated, conventional automatic or manual dialing of any access code and/or phone number prevails.

In still yet another operation of this invention, if it is determined that the display button has been activated and the digit corresponding to the stored phone number of the person to be contacted has not been activated, the calling party automatically or manually dials the stored phone number or any other desired phone number of the person to be contacted.

#### BRIEF DESCRIPTION OF THE DRAWINGS

The invention may be better understood from the following description when read together with the drawing, in which:

FIG. 1 shows, in flow chart form, method and apparatus for accessing originating central office equipment to control the disclosure of a calling party's DN to a called party who subscribes to Caller ID service or to any other CLASS service by performing different automatic or manual calling operations;

FIG. 2 shows, in flow chart form, method for sending via a voice channel of a busy or an idle telephone line to an apparatus at a called station a DN of a calling party from terminating central office equipment, and the apparatus receiving the DN, generating and assigning a numeric digit to the received DN, displaying the received DN in a display counter, and storing the received DN to memory;

FIG. 2A shows, in flow chart form, method for sending via a voice channel of a busy or an idle telephone line to a called station ringing signals only or a call-waiting tone signal only from terminating central office equipment responsively to receiving a flagged "private" DN from originating central office equipment;

FIG. 2B shows, in flow chart form, method for automatically dialing a stored DN of a previous caller previously sent from terminating central office equipment responsively to the receipt of the DN flagged as public from originating central office equipment; and

FIG. 3 shows a simplified diagram of the principal components of an apparatus (telephone set or other receiving and sending devices) connected via telephone lines and a RJ11 jack to originating or terminating central office equipment for performing the various operations of the inventions.



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DESCRIPTION OF THE PREFERRED  
EMBODIMENT (S)

A first operation of the invention is illustrated in the flow chart of FIG. 1, which shows a calling party (step 101) programming its apparatus while in an on-hook mode to perform a desired automatic and/or manual calling operation by pressing either the block button or the display button on the apparatus plus a digit on the apparatus keypad corresponding to a prestored phone number of the person or entity to be contacted. The calling party (step 102) then causes the apparatus to go into an off-hook mode by either pressing a predetermined button on the apparatus or by lifting the handset on the apparatus. The originating central office equipment, prior art, responds to the off-hook condition on the calling party telephone line by sending dial tone. The dial tone detector (step 103), which is connected to the apparatus, detects the dial tone and signals the microprocessor (steps 105 and 106) which, in turn, determines whether the block button or the display button has been activated by the calling party (step 101). However, if the dial tone is not detected by the dial tone detector (step 103), it is presumed that the calling party apparatus is not connected via telephone lines to the originating central office equipment.

Assuming that the microprocessor (steps 105 and 106) determines that the block button has, indeed, been activated, the autodialer with memory unit (step 108), which is connected to the apparatus, automatically dials a prestored access code which instructs the originating central office equipment to temporarily flag the calling party permanent stored "public" DN as "private". The microprocessor (step 109) makes another decision, while the autodialer with memory unit (step 108) is in a pause mode, to determine whether the digit corresponding to the prestored phone number of the person or entity to be contacted has been activated. If it is determined that the digit has been activated, the autodialer with memory unit (step 111) is signaled to start dialing the prestored phone number. The originating central office equipment (step 112), prior art, responds to the receipt of the autodialed phone number by flagging the calling party permanent stored "public" DN as "private" and transmitting the flagged "private" DN to the terminating central office equipment to which the called party telephone line is connected.

Referring now back to the microprocessor (steps 106 and 109), if it is determined that the display button and the digit corresponding to the prestored phone number have been activated, step 111 is the same as previously described. The originating central office equipment (step 112), prior art, responds to the receipt of the autodialed phone number by flagging the calling party permanent stored DN as "public" and transmitting the flagged "public" DN to the terminating central office equipment to which the called party telephone line is connected.

Referring now back to the microprocessor (steps 105 and 106), if it is determined that neither the block button nor the display button has been activated, the calling party (step 107) is permitted to conventionally dial, either automatically and/or manually, any access code and/or phone number of choice.

Referring now back to the microprocessor (steps 105, 106 and 109), if it is determined that the display button has been activated but the digit corresponding to the prestored phone number has not been activated, the calling party (step 110) is permitted to conventionally dial, either automatically or manually, the prestored phone number or any other phone number of choice.

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In FIG. 2, the terminating central office equipment (step 201) to which a called party telephone line is connected receives a calling party flagged "public" DN from originating central office equipment to which the calling party telephone line is connected.

The terminating central office equipment (step 202) responds to the receipt of a calling party flagged "public" DN from originating central office equipment to which the calling party telephone line is connected by connecting to a voice channel of a called party busy telephone line with a call-waiting tone signal and sending the calling party DN to an apparatus at the called station during a silent interval after the call-waiting tone signal, or by connecting to a voice channel of a called party idle telephone line with ringing signals and sending the calling party DN to an apparatus at the called station during a silent interval between the ringing signals.

A receiver-decoder (step 203), connected to the called party apparatus (telephone set or separate stand alone unit), receives and decodes signals representing the calling party DN sent from the terminating central office equipment (step 202). A number generator (step 204), connected to the apparatus, generates and assigns a numeric digit or digits to each DN received to the receiver-decoder (step 203). An alphanumeric display unit (step 205), connected to the apparatus, displays the DN and its assigned numeric digit or digits in an LED or LCD display counter. A memory unit (step 206), connected to the apparatus, stores the DN and its assigned digit or digits to memory for later recall and display.

In FIG. 2A, the terminating central office equipment (step 207) to which a called party telephone line is connected receives a calling party flagged "private" DN from originating central office equipment to which the calling party telephone line is connected. The terminating central office equipment (step 208) responds to the receipt of the flagged "private" DN from the originating central office equipment by connecting to a voice channel of the called party busy telephone line with a call-waiting tone signal only, or by connecting to a voice channel of the called party idle telephone line with ringing signals only.

In FIG. 2B, assuming that the called party missed the incoming call from the calling party and decides to return the missed call, the called party presses a recall button (step 209) on the apparatus to recall the stored DN from the memory unit (step 206 of FIG. 2) for display in the LED or LCD display counter (step 205 of FIG. 2). The called party (step 210) then causes the apparatus to go into an off-hook mode so as to receive dial tone from the originating central office equipment 301 of FIG. 3 and then presses the digit or digits assigned to the stored DN on a keypad (step 211) on the apparatus. An autodialer unit (step 212) of the apparatus responds to the digit or digits pressed on the keypad by automatically dialing the stored DN.

In FIG. 3, is shown a simple block diagram configuration of the principal components (303A, 303B, 303C, 303D, 303E, 303F, 303G and 303H) of an apparatus 303 (telephone set or separate stand alone unit 303) connected via telephone lines and a RJ11 jack 302 to originating or terminating central office equipment 301.

Dial tone detector 303A is for detecting dial tone sent from originating central office equipment 301 responsively to an off-hook condition detected on the telephone line of apparatus 303.

Autodialer with memory unit 303C is for automatically dialing a prestored access code and/or a stored phone number.

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Receiver-decoder 303D is for receiving and decoding signals representing a calling party's DN sent from terminating central office equipment 301 during a silent interval between ringing signals or following a call-waiting tone signal.

Number generator 303E is for generating and assigning a numeric digit(s) to each DN received via receiver-decoder 303D.

Display unit 303F is for displaying in an LED or LCD display counter on apparatus 303 the DN received from terminating central office equipment 301 via receiver-decoder 303D, and for displaying in the LED or LCD display counter a stored DN when recalled from memory unit 303G.

Memory unit 303G is for storing to memory for later recall, display and automatic or manual dialing of the DN received from terminating central office equipment 301 via receiver-decoder 303D.

Autodialer unit 303H is for automatically dialing the stored DN in memory unit 303G.

Recall button on apparatus 303 is for initiating the recall of the stored DN from memory unit 303G for visual display in the LED or LCD display counter on apparatus 303.

Display button, block button and keypad on apparatus 303 are for enabling programming of the apparatus 303 on a per call basis to perform a desired automatic and/or manual calling operation.

Microprocessor 303B is for interacting with and controlling the above functions or functional devices by any known technique.

Originating central office equipment 301 is responsive to the receipt of an autodialed phone number of a person to be contacted for temporarily flagging a DN of a calling party "public" or "private" and then sending the flagged "public" or "private" DN to terminating central office equipment to which the person to be contacted telephone line is connected in the manner conventional for the Caller ID process. The originating central office equipment 301 is also for sending dial tone to a telephone station of a calling party in response to an off-hook condition detected on a telephone line of the telephone station.

Terminating central office equipment 301 is responsive to the receipt of a flagged "public" DN from originating central office equipment for connecting to a voice channel of a busy telephone line of a telephone station with a call-waiting tone signal and then transmitting the DN to an apparatus 303 at the telephone station during a silent interval after the call-waiting tone signal, or for connecting to a voice channel of an idle telephone line of the telephone station with ringing signals and then transmitting the DN to an apparatus 303 at the telephone station during a silent interval between the ringing signals. Terminating central office equipment 301 is also responsive to the receipt of a flagged "private" DN from originating central office equipment for connecting to a voice channel of a busy telephone line of a telephone station with a call-waiting tone signal only, or for connecting to a voice channel of an idle telephone line of a telephone station with ringing signals only.

While the present invention has been described in connection with preferred embodiment (s) thereof, it is to be understood that additional embodiment (s), modifications and applications that will become obvious to those skilled in the art are included within the spirit and scope of the invention.

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What is claimed is:

1. A method for sending to a called station of a first party who subscribes to a Custom Local Area Signaling System (CLASS) service including Caller Identification (Caller ID) and who is engaged in a telephone conversation with a second party a directory telephone number (DN) of a third party calling a telephone number of the first party, comprising the steps of:

(a) receiving at a terminating central office of the first party who subscribes to said CLASS service including said Caller ID and who is engaged in the telephone conversation with the second party the third party DN flagged as public from an originating central office of the third party indicating that said DN of the third party is to be disclosed at the called station of the first party;

(b) said terminating central office sending a call waiting (CW) tone signal to the first party; and

(c) said terminating central office then transmitting said DN of the third party to the called station of the first party during a silent interval after said CW tone signal.

2. The method as set forth in claim 1, further comprising the steps of:

(d) receiving by an apparatus at the called station of the first party during the silent interval after said CW tone signal said DN of the third party from said terminating central office of the first party;

(e) generating and associating an identifier to said received DN of the third party;

(f) displaying said received DN of the third party in a display; and

(g) storing said received DN of the third party in memory.

3. A method as set forth in claim 2, wherein the apparatus is a pushbutton telephone or other receiving and sending equipment.

4. A method as set forth in claim 2, wherein said generated identifier is a number.

5. A method as set forth in claim 1, wherein said terminating central office is telephone company terminating central office equipment.

6. A method as set forth in claim 1, wherein said terminating central office is cellular company terminating central office equipment.

7. A method for sending to a called station of a first party who subscribes to a Custom Local Area Signaling System (CLASS) service including Caller Identification (Caller ID) and who is engaged in a telephone conversation with a second party a directory telephone number and name (DN) of a third party calling a telephone number of the first party, comprising the steps of:

(a) receiving at a terminating central office of the first party who subscribes to said CLASS service including said Caller ID and who is engaged in the telephone conversation with the second party the third party DN flagged as public from an originating central office of the third party indicating that said DN of the third party is to be disclosed at the called station of the first party;

(b) said terminating central office sending a call waiting (CW) tone signal to the first party; and

(c) said terminating central office then transmitting said DN of the third party to the called station of the first party during a silent interval following said CW tone signal.

8. A method as set forth in claim 7, further comprising the steps of:

(d) receiving by an apparatus at the called station of the first party during the silent interval following said CW

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tone signal said DN of the third party from said terminating central office of the first party and displaying said received DN of the third party in a display on the apparatus.

9. A method as set forth in claim 8, wherein the apparatus is a pushbutton telephone or other receiving and sending equipment.

10. A method as set forth in claim 8, further comprising the steps of:

(e) generating and associating a number to said received DN of the third party; and

(f) storing said received DN of the third party in memory.

11. A method as set forth in claim 7, wherein said terminating central office is telephone company terminating central office equipment.

12. A method as set forth in claim 7, wherein said terminating central office is cellular company terminating central office equipment.

13. A method for sending to a called station of a first party who is engaged in a conversation with a second party via a local switching office (LSO) a directory telephone number (DN) of a third party calling a telephone number of the first party, comprising the steps of:

(a) after receiving at said LSO said DN of the third party marked as public from an originating central office of the third party, indicating that said DN of the third party is to be disclosed at the called station of the first party, sending a call waiting tone signal to the first party;

(b) said LSO then transmitting to the called station of the first party said DN of the third party during a silent interval after the call waiting tone signal cycle; and

(c) receiving by an apparatus at the called station of the first party during the silent interval after the call waiting tone signal cycle said DN of the third party from said LSO and displaying said received DN of the third party on a display of the apparatus.

14. A method as set forth in claim 13, wherein said LSO is telephone company terminating central office equipment.

15. A method as set forth in claim 13, wherein said LSO is cellular company terminating central office equipment.

16. A method as set forth in claim 13, wherein the apparatus is a pushbutton telephone or other receiving and sending equipment.

17. A method as set forth in claim 13, further comprising the steps of:

(d) generating and associating an identifier to said received DN of the calling party; and

(e) storing said received DN of the calling party in memory.

18. A method for transmitting to a called station of a first party who subscribes to a Custom Local Area Signaling System (CLASS) service including Caller Identification (Caller ID) and who is engaged in a telephone conversation with a second party a directory telephone number (DN) of a third party calling a telephone number of the first party, comprising the steps of:

(a) receiving at a terminating central office (TCO) of the first party who subscribes to said CLASS service including said Caller ID and who is engaged in the telephone conversation with the second party the third party DN flagged as public from an originating central office of the third party;

(b) said TCO sending a call waiting tone signal to the first party; and

(c) said TCO then transmitting the third party DN to the called station of the first party.

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19. A method as set forth in claim 18, wherein said TCO is telephone or cellular company switching office equipment.

20. A method as set forth in claim 18, wherein step (c) comprises the step of transmitting a corresponding name along with said DN of the third party.

21. A method as set forth in claim 18, wherein said TCO transmits the third party DN to the called station of the first party during a silent interval after the call waiting tone signal.

22. A method as set forth in claim 18, wherein step (c) comprises the step of connecting to a voice channel of the first party busy telephone line before said DN of the third party is transmitted to the called station of the first party.

23. A method for indicating to a first party who subscribes to a Custom Local Area Signaling System (CLASS) service including Caller Identification (Caller ID) and who is engaged in a telephone conversation with a second party an incoming call from a third party calling a telephone number of the first party comprising the steps of:

(a) receiving at a terminating central office (TCO) of the first party who subscribes to said CLASS service including said Caller ID and who is engaged in the telephone conversation with the second party the third party directory telephone number (DN) flagged as private from an originating central office of the third party, indicating that said DN of the third party is not to be disclosed at the first party called station; and

(b) said TCO then sending a call waiting (CW) tone signal to the first party, said CW tone signal indicates to the first party the incoming call from the third party.

24. A method as set forth in claim 23, wherein said TCO is telephone or cellular company switching office equipment.

25. A method for transmitting to a called station of a first party who subscribes to a Custom Local Area Signaling System (CLASS) service including Caller Identification (Caller ID) and who is engaged in a telephone conversation with a second party a directory telephone number (DN) of a third party calling a telephone number of the first party, comprising the steps of:

(a) receiving at a terminating central office (TCO) of the first party who subscribes to said CLASS service including said Caller ID and who is engaged in the telephone conversation with the second party the third party DN flagged as public from an originating central office of the third party, indicating that said DN is to be disclosed at the called station of the first party;

(b) said TCO sending a call waiting tone signal to the first party; and

(c) said TCO then transmitting said DN of the third party to the called station of the first party.

26. A method as set forth in claim 25, wherein step (c) comprises the step of transmitting a name along with said DN of the third party to the called station of the first party.

27. A method as set forth in claim 25, wherein said TCO is telephone or cellular company switching office equipment.

28. A method as set forth in claim 25, wherein said DN of the third party is transmitted to the called station of the first party during a call waiting tone signal cycle silent interval.

29. A method as set forth in claim 25, further comprising the steps of:

(d) receiving by an apparatus of the first party said DN of the third party from said TCO and displaying said received DN in a display on the apparatus;

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- (e) generating and associating a number to said received DN of the third party; and
  - (f) storing said received DN of the third party in memory.
30. A method as set forth in claim 25, wherein step (c) comprises the step of connecting to a voice channel of the first party busy telephone line before said DN of the third party is transmitted to the called station of the first party.
31. A method as set forth in claim 25, wherein said TCO transmits the third party DN to the called station of the first party during the call waiting tone signal cycle silent interval.
32. A method for sending a call waiting (CW) tone signal only to a first party who subscribes to a Custom Local Area Signaling System (CLASS) service including Caller Identification (Caller ID) and who is engaged in a telephone conversation with a second party, comprising the steps of:
- (a) receiving at a terminating central office (TCO) of the first party who subscribes to said CLASS service including said Caller ID and who is engaged in the telephone conversation with the second party a calling third party directory telephone number (DN) flagged as private from an originating central office of the calling third party indicating that said received DN of the calling third party is not to be disclosed at the first party called station; and
  - (b) said TCO then sending said CW tone to the first party.
33. A method as set forth in claim 32, wherein said TCO is telephone or cellular company switching office equipment.
34. A method for receiving at a busy telephone station during a call waiting tone signal cycle silent interval an incoming caller directory telephone number with a corresponding name (DN) from a terminating central office (TCO), comprising the steps of:
- (a) receiving at the busy telephone station during the call waiting tone signal cycle silent interval the incoming caller DN from said TCO and displaying said received DN of the incoming caller in a display;
  - (b) generating and associating a number to said received DN; and
  - (c) storing said received DN of the incoming caller in memory.
35. A method as set forth in claim 34, wherein the incoming caller is a third party (call waiting caller) calling a telephone number of a first party who subscribes to a Custom Local Area Signaling System (CLASS) service including Caller Identification (Caller ID) and who is engaged in a telephone conversation with a second party.
36. A method of providing to a first party who is already engaged in a conversation with a second party identifying information related to a third party who wishes to converse with the first party, comprising the steps of:
- (a) after receiving at a local switching office (LSO) serving the first party said identifying information marked as public from an originating central office of the third party, indicating that said identifying information related to the third party is to be disclosed at the first party called station, sending a call waiting tone signal to the first party;
  - (b) said LSO then transmitting to said called station of the first party said identifying information related to the third party; and
  - (c) receiving by an apparatus at said called station of the first party said identifying information related to the

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- third party from said LSO and displaying said received identifying information related to the third party on a display on the apparatus.
37. The method of claim 36, further comprising the steps of:
- (d) generating an identifier and associating said generated identifier to said received identifying information; and
  - (e) storing said received identifying information in memory.
38. A method as set forth in claim 37, wherein step (e) comprises the step of storing said generated identifier in said memory along with said received identifying information related to the third party.
39. A method as set forth in claim 36, wherein said identifying information related to the third party is transmitted to said called station of the first party during the call waiting tone signal cycle silent interval.
40. A method as set forth in claim 36, wherein said identifying information related to the third party is received by the first party apparatus during the call waiting tone signal cycle silent interval.
41. A method as set forth in claim 36, wherein said identifying information related to the third party is transmitted to the first party only if said identifying information is received at telephone or cellular company terminating central office equipment of the first party flagged as public from telephone or cellular company originating central office equipment of the third party, indicating that said identifying information is to be disclosed at said called station of the first party.
42. A method as set forth in claim 36, wherein said identifying information is a directory telephone number of the third party.
43. A method as set forth in claim 36, wherein said identifying information is a directory telephone number and name of the third party.
44. A method as set forth in claim 36, wherein said identifying information is a directory name of the third party.
45. A method as set forth in claim 36, wherein said identifying information related to the third party is transmitted to said called station of the first party who subscribes to a CLASS service including Caller ID and who is engaged in an existing ongoing telephone conversation with a second party.
46. The method of claim 36, further comprising the steps of:
- (d) the first party apparatus generating an identifier; and
  - (e) the first party apparatus storing said received identifying information in memory.
47. A method as set forth in claim 46, wherein step (d) comprises the step of the first party apparatus associating said generated identifier to said received identifying information.
48. A method as set forth in claim 46, wherein said generated identifier is a number, figure or digit which identifies and sets apart said received identifying information from other received identifying information.
49. A method as set forth in claim 46, further comprises the step of the first party apparatus recalling said stored identifying information from said memory and displaying said recalled identifying information in a display if a user presses a recall button on the first party apparatus.

\* \* \* \* \*

# **EXHIBIT B**





Steven J. Henry  
shenry@wolfgreenfield.com  
direct dial 617.646.8238

Registered Mail  
Return Receipt Requested

April 13, 2005

Mr. Ivan G. Seidenberg  
Chairman and CEO  
Verizon Communications, Inc.  
1095 Avenue of the Americas  
New York, NY 10036

Re: U.S. Patent 6,868,150 ("Reese")  
Our File: R0573.90004 US00

Dear Mr. Seidenberg:

This firm represents Mr. Morris Reese of Thousand Oaks, California in connection with the licensing of his United States Patent No. 6,868,150 ("the '150 patent"). The '150 patent, titled "Method for Use with Caller ID System," was duly issued by the US Patent & Trademark Office of March 15, 2005 and carries an effective filing date of April 25, 1991.

Your attention is directed in particular to claims 25 and 36 of the '150 patent, a copy of which is enclosed for your convenience. These claims are exemplary; we do not mean to imply that they are the only claims of interest.

Taking claim 36 first, the '150 patent claims therein a method of providing to a first party (e.g., a called party) who is already engaged in a conversation with a second party (e.g., a far-end caller) identifying information (e.g., a telephone number and, if applicable, a name) related to a third party (e.g., a call waiting caller) who wishes to converse with the first party. In claim 25, the '150 patent covers a method for transmitting, to a called station of a first party (e.g., a called party, as above) who subscribes to a custom local area signaling system (CLASS) service including caller identification (e.g., caller ID) and who is engaged in a telephone conversation with a second party (e.g., a far-end caller, as above), a directory telephone number of a third party (e.g., a call waiting caller) who is calling a telephone number of the first party.



Mr. Ivan G. Seidenberg  
April 13, 2005  
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While the '150 patent may be relevant to other products, we believe it is at least applicable to customers subscribed to "Call Waiting ID" service. Consequently, Mr. Reese is offering attractive and reasonable non-exclusive licensing opportunities to (land-line) telephone and cellular operating companies who provides "Call Waiting ID" service. (Such Call Waiting ID is sometimes referred to as "Caller ID with Call Waiting" or "CIDCW" or "Type II CID".)

Your company, we believe, provides "Call Waiting ID" service to at least some of its subscribers. To continue to provide that service, your company requires a license from Mr. Reese. Consequently, we believe that taking a license under the '150 patent is the responsible course of action for you. We invite you to open licensing discussions and ask that you respond no later than May 13, 2005 to let us know your interest in a license under the '150 patent. An early indication of interest will receive the most positive response from us.

Thank you for your consideration. We look forward to hearing from you in the near future.

Very truly yours,

WOLF, GREENFIELD & SACKS, P.C.

A handwritten signature in black ink, appearing to read "SJA", with a long, sweeping horizontal line extending to the right.

Steven J. Henry

Enclosure

# **EXHIBIT C**





Steven J. Henry  
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Registered Mail  
Return Receipt Requested

April 13, 2005

Edward E. Whitacre, Jr.  
Chairman and CEO  
SBC Communications, Inc.  
175 East Houston Street  
San Antonio, TX 78205-2233

Re: U.S. Patent 6,868,150 ("Reese")  
Our File: R0573.90006 US00

Dear Mr. Whitacre:

This firm represents Mr. Morris Reese of Thousand Oaks, California in connection with the licensing of his United States Patent No. 6,868,150 ("the '150 patent"). The '150 patent, titled "Method for Use with Caller ID System," was duly issued by the US Patent & Trademark Office of March 15, 2005 and carries an effective filing date of April 25, 1991.

Your attention is directed in particular to claims 25 and 36 of the '150 patent, a copy of which is enclosed for your convenience. These claims are exemplary; we do not mean to imply that they are the only claims of interest.

Taking claim 36 first, the '150 patent claims therein a method of providing to a first party (e.g., a called party) who is already engaged in a conversation with a second party (e.g., a far-end caller) identifying information (e.g., a telephone number and, if applicable, a name) related to a third party (e.g., a call waiting caller) who wishes to converse with the first party. In claim 25, the '150 patent covers a method for transmitting, to a called station of a first party (e.g., a called party, as above) who subscribes to a custom local area signaling system (CLASS) service including caller identification (e.g., caller ID) and who is engaged in a telephone conversation with a second party (e.g., a far-end caller, as above), a directory telephone number of a third party (e.g., a call waiting caller) who is calling a telephone number of the first party.



Mr. Edward E. Whitacre, Jr.  
April 13, 2005  
Page 2

While the '150 patent may be relevant to other products, we believe it is at least applicable to customers subscribed to "Call Waiting ID" service. Consequently, Mr. Reese is offering attractive and reasonable non-exclusive licensing opportunities to (land-line) telephone and cellular operating companies who provides "Call Waiting ID" service. (Such Call Waiting ID is sometimes referred to as "Caller ID with Call Waiting" or "CIDCW" or "Type II CID".)

Your company, we believe, provides "Call Waiting ID" service to at least some of its subscribers. To continue to provide that service, your company requires a license from Mr. Reese. Consequently, we believe that taking a license under the '150 patent is the responsible course of action for you. We invite you to open licensing discussions and ask that you respond no later than May 13, 2005 to let us know your interest in a license under the '150 patent. An early indication of interest will receive the most positive response from us.

Thank you for your consideration. We look forward to hearing from you in the near future.

Very truly yours,

WOLF, GREENFIELD & SACKS, P.C.

A handwritten signature in black ink, appearing to read "S. Henry", written in a cursive style.

Steven J. Henry

Enclosure