Managing access rights for MyEPO services

Frequently Asked Questions (FAQs)

Why are user access rights important and what is a company administrator?

We take the security and confidentiality of your information very seriously.

That's why, before allowing you to access confidential patent procedure-related information online using our MyEPO services (like MyEPO Portfolio, Online Filing 2.0, Central Fee Payment), we require you first to create an EPO account with two-step verification and also to confirm to us your identity and company.

We also require someone from the company associated with your account to go into MyEPO Portfolio to grant you access rights. That person is a "company administrator",

A "company administrator" is any user shown as having administration rights in the "Admin area" of MyEPO Portfolio, and every company must have at least one company administrator.

Note: if you are applying for a patent as a private person, and not on behalf of a company or through a professional representative, then you will have administration rights for yourself only.

Company administrators can grant other users:

- administration rights
- access to the company mailbox
- the right to pay fees and view payment plans
- access to view portfolios of applications, including non-public documents
- access to draft and send submissions, duly signed by the appointed representative

They can do this for all users whose EPO account was associated with the administrator's company when they registered to use MyEPO services.

Administrators are also responsible for

- informing the EPO about changes concerning the company
- regularly checking whether access has been correctly granted to users
- removing access immediately when users leave the company or change roles
- identifying "recipients" (representatives, associations or self-representing parties) whose EPO communications will be sent to the company mailbox and whose portfolios can be accessed using MyEPO Portfolio

In summary: company administrators have a vital role to play in ensuring that online access to confidential patent procedure-related information is only granted to those members of staff who should have access.

What has changed in the way user access is being managed? Why has it been changed?

In the past, Company Administrators were only able to grant other users administration rights, access to the company mailbox, and the right to pay fees and view payment plans.

They couldn't manage permissions to view and act on portfolios of applications owned by a representative or association. This had to be done in MyEPO Portfolio by the representative themselves using the "Manage permissions" option in the "Applications and patents" screen.

In response to feedback from the user focus groups that have been guiding us on the features we include in MyEPO services, we have changed this so that Company Administrators can manage permissions to view and act on portfolios of applications.

- A representative will no longer be able to manage these permissions unless they also have administration rights.
- Permission to access portfolios can only be granted on behalf of representatives, associations or self-representing parties that have been identified as Mailbox recipients in the "Admin area" of MyEPO Portfolio.

The advantage of this change is that Company Administrators are now empowered to manage all MyEPO Portfolio access rights for their company. The option exists for companies to centralise this role with a specialist team of administrators.

I'm a representative and have always had access in MyEPO Portfolio to the portfolio of associations that I am a member of, as well as my own portfolio. Do I still have access to these portfolios following this change, or do I need to ask the company administrator to give me access?

You still have access to these portfolios, <u>provided</u> that your portfolio and / or your association's portfolio is defined as a mailbox recipient. The company administrator may remove your access if that fits your ways of working better.

I'm a representative and already granted my team members access to my portfolios in the MyEPO Portfolio "Applications and Patents" screen. Do they still have access to my portfolios following this change, or do I need to ask the company administrator to give them access again?

If you already granted access to members of your team using the "Manage permissions" option, then they still have access <u>provided</u> that your portfolio is defined as a mailbox recipient. The company administrator may remove their access if that fits your ways of working better.

I’m a company administrator. Can I use MyEPO Portfolio to manage access rights to other MyEPO services, like Online Filing 2.0, Central Fee Payment?

For Online Filing 2.0, you should use the user administration feature available in Online Filing 2.0.

For Central Fee Payment, you can use MyEPO Portfolio to manage which users are allowed to pay fees and view payment plans.

Can I manage user access rights and recipients for the old Mailbox tool in MyEPO Portfolio?

Yes. The admin area of MyEPO Portfolio allows you to manage your users’ access to the EPO Mailbox, whether they access it via the old Mailbox tool or via MyEPO Portfolio. .
You no longer need to use the old Administration Facility.

Remember: the old Mailbox tool and Administration Facility will be decommissioned in June 2024, so we strongly advise you instead to start using MyEPO Portfolio today to handle your EPO communications.

If someone leaves my company, how can I remove their online access to our confidential information?

Your company administrators are responsible for ensuring that the person no longer has access to your confidential information. This will not be done automatically by the EPO.

Your company administrator should:

- use the administration options in MyEPO Portfolio and Online Filing 2.0 to remove the user’s access rights immediately in the **Admin Area** (“company member” option) and in **Applications and Patents** (“Manage Permissions”) for any application portfolios that they had access to.
- use the **Admin Area** of MyEPO Portfolio to check that the list of users with administration rights is up to date, especially when the departing person was a company administrator.
- reallocate files of a departing professional representative immediately. If you need instructions on how to do this contact support@epo.org. Note: the EPO does not automatically re-allocate files without specific instructions.
- submit a request to the EPO to change the association of professional representatives so that a departing professional representative is removed. https://www.epo.org/applying/online-services/representatives/change-association.html

The person leaving the company should:

- Contact support@epo.org to update the company and deposit account linked to their EPO account or smart card.
- Update their EPO account settings to change the email address associated with their EPO account.
- If they are a departing professional representative, inform the EPO’s Legal Division of the change of business address https://www.epo.org/applying/online-services/representatives/changes.html

Note: the EPO does not automatically change user details without specific instructions.

When signing up to use MyEPO services, you asked for my company details. Does this need to be my actual company?

No. Companies in MyEPO Portfolio have no legal meaning under the EPC. They are simply a way of grouping users together, so they can work collaboratively. You can use any name for your company in MyEPO Portfolio.

My company is large, and we have several teams working independently from each other. Can I create teams within my company?

Yes. You can create as many MyEPO “companies” as you wish. You do not need to have just one your company. To do that you will need to follow these steps:

- Create a new MyEPO Profile, entering the name of your team such as My Company – Team Name, in the company field. You will be then defined as admin of that team.
- Prompt your colleagues to follow the step above.
- Add to the mailbox of that team the portfolios that the team will be working with.

I want to access the portfolio of an attorney, association or applicant, but keep receiving communications by paper. Can I do that?

Yes. We recommend you receive communications electronically, but if you really need to receive communications on paper, you can access a portfolio with the following steps:

- Add the portfolio you wish to access as a recipient to your mailbox, in the Admin Area of MyEPO Portfolio.
- Once the portfolio is added, you can then turn off electronic communications for that recipient. You will then have access to the portfolio, but still receive the communications by paper.

As a patent attorney, I want to see who has access to my portfolio and be able to manage it. Can I do that?

You can if you are defined in MyEPO Portfolio as a company administrator. If you have been added as a recipient, and have administrative rights, you will be able to view your portfolio and see which colleagues have permission to access it.

As a patent attorney, I work in a patent law firm A, but I have my own private practice B. I would like to have access to the files of A and to my own files of B. Can I do this?

Yes, you can access both portfolios under which ever company you are entered as a recipient. You can only be entered once as a recipient, for which we use your representative number. This number allows access to your complete portfolio, and can only be used for firm A or firm B.

If you have a colleague in firm A, who is also a professional representative, you can form an association. You could manage all your applications for firm A under the association number, and add that as a recipient for firm A. Then all communications and portfolios for Firm A would be available there.

For firm B you can manage all applications under your own name, add yourself as a recipient with your own representative number and have all the communications and portfolio available under firm B.

If you are not in a position to form an association with a colleague, you will have to decide between using firm A or firm B to access communications and portfolios in MyEPO Portfolio.

As a patent attorney, I had access to my portfolio of applications, but I have lost access since the EPO changed the way user access is being managed . Why is this?

This is most likely because you are not defined as a mailbox recipient in the company to which your account is associated.

Please contact your MyEPO company administrator to add you as a recipient to the company mailbox and give you access to your portfolio.

Why can’t I see all my PCT applications in the MyEPO Portfolio "Applications and Patents" screen?

While you can receive communications about all your PCT applications via the “Mailbox” screen in MyEPO Portfolio, at this point, we are only able to show Euro-PCT applications in the “Applications and Patents” screen. We do not yet show PCT applications in the international phase where the EPO is ISA/ IPEA.

Ideally, we will remove this limitation in future. But at this point, for technical reasons, we do not show them.

Where can I go for more information or if I’m not sure?

The “MyEPO Portfolio guide for managing user access” provides step-by-step instructions.

In case of questions, please contact support@epo.org or your EPO key account manager if you have one.