MyEPO Services

Feature guide: user registration with two-step verification
1. Introduction

Some of our online services, such as Espacenet, are publicly available and do not require you to have an EPO account. Others require you to sign in via your EPO account using the default verification method, a combination of email address and password.

However, in the case of MyEPO services (MyEPO Portfolio, Online Filing 2.0 and Central Fee Payment), we need to be sure of your identity and permissions to access confidential EP and PCT information. So you will need to sign in via your EPO account, using either two-step verification or an EPO smart card.

Two-step verification is where you use the default verification method – a combination of email address and password – and at least one other verification method. The following two-step verification methods are currently supported

- Okta Verify. This is an app on the mobile phone that receives notifications in the form of a "Yes" or "No". It can also provide 6-digit codes generated for temporary use.
- Google Authenticator. This is an app on the mobile phone that generates temporary 6-digit codes.
- SMS. This sends a 6-digit code via text message to your phone.
- Email. This sends a 6-digit code or a direct link to the registered email address.

We strongly advise you to set up more than one two-step verification methods, to avoid difficulties if you can’t use one of them – for example if you lose your telephone.

This feature guide explains:

- How to create an EPO account with two-step verification if you are a new user without a smart card (see section 2)
- How to start using two-step verification if you are an existing user with a smart card (see section 3)
- How to change your EPO account settings (see section 4)

Please note you will no longer be able to use smart cards from the end of 2024. We strongly advise you to start using two-step verification today.
2. Create an EPO account if you are a new user (without a smart card)

Access the page to create an EPO account here: https://ciam.epo.org/registration

Enter your first name, last name, and email address, and accept the “Terms and conditions for EPO online services electronic infrastructure”.

You will receive an email that prompts you to verify that the address is indeed accessible and to set a new password.
Once the password has been set, select a two-step verification method of choice (see section 1 for further details about the available methods).

Select verification methods

We use two-step verification to make signing in more secure. Select one of the options below:

- **Most secure option:** verify my identity using some of the following:
  - Okta Verify
  - Google Authenticator
  - Phone text message (SMS)
- Verify my identity by email

You can change the verification methods later in Account settings.
We strongly advise you to set up more than one two-step verification methods, to avoid difficulties if you can’t use one of them – for example if you lose your telephone.

You can choose between the most secure options (Okta Verify, Google Authenticator, or text message by SMS) or verification by email. If you select email, you will be taken to the last page. Otherwise, you first select one of the more secure options and add them to your account.
A final page appears confirming that your EPO account has been set up.

To get access to MyEPO services (MyEPO Portfolio, Online Filing 2.0 and Central Fee Payment), you should then select the option to complete your set-up in MyEPO Portfolio.

Your EPO account is now set up.

To use your EPO account to access our online services for patent applications and related proceedings, please complete your set-up by supplying us with a few more details in MyEPO Portfolio:

Complete set-up in MyEPO Portfolio

For a list of all our online services, including services that require an EPO account, visit our online services overview page:

See all our online services

You will then be asked to fill in a few more details. When you submit the information, you will receive an e-mail with the details attached in a form. You should sign this form and send it via e-mail to support@epo.org.

Important note: the EPO uses “companies” to group users who wish to work collaboratively with a shared mailbox, and to work as a team with portfolios of applications. The company field in the form does not necessarily need to reflect the legal entity you work for. If you wish to join an existing team of users, please ask the administrator of that group for the exact name of the “company” they have set up in MyEPO Portfolio, so you can be part of that team.

The enrolment request will be reviewed internally by the EPO, including an identity check. Once accepted, another e-mail will be sent informing you that your registration for MyEPO Portfolio is now active.
Your company administrator can then assign you more specific access rights in the user administration screens of MyEPO Portfolio and Online Filing 2.0.
3. **Enable two-step verification if you are an EPO smart card user**

If you are an EPO smart card user, please note you will no longer be able to use smart cards from the end of 2024. We strongly advise you to enable two-step verification today.

First, sign in using the EPO smart card and PIN to access a special page that starts the process: [https://ciam.epo.org/migration](https://ciam.epo.org/migration)

You will be asked to enter the PIN of your smart card.
At the next screen provide your email address, and to continue you need to accept the Terms and conditions for EPO online services electronic infrastructure.

Next, choose your password.

Then, set up a two-step verification method of your choice in the next screen (see section 1 for further details about the available methods).

We strongly advise you to set up more than one two-step verification methods, to avoid difficulties if you can’t use one of them – for example if you lose your telephone.
You can choose between the most secure options (Okta Verify, Google Authenticator, or text message by SMS) or verification by email.
Select verification methods: Most Secure Option

If you select “Most secure option”, you'll be given the menu with the different 2FA options available. You can select one method and finish or select more than 1 method and then finish. For each method, follow the instructions.

- Google Authenticator
  Enter a temporary code generated from the Google Authenticator app.
  Used for access
  - Setup

- Okta Verify
  Okta Verify is an authenticator app, installed on your phone, used to prove your identity
  Used for access
  - Setup

- Phone
  Code sent by text message (SMS)
  Used for access
  - Setup
Click “Finish” after adding a method (as an example, the screen below shows the Finish button after adding Google Authenticator).

Set up verification methods

soloh1895@gmail.com

Set up one or more verification methods.

Set up optional

Okta Verify
Okta Verify is an authenticator app, installed on your phone, used to prove your identity
Used for access
Set up

Phone
Code sent by text message (SMS)
Used for access
Set up

Finish
The last screen confirms the successful addition of two-step verification.

Two-step verification set up for your account.

This means that you can now sign in to your EPO account using the default verification method – a combination of email address and password – and at least one other verification method. Or sign in using your smart card as before.

Close and re-open your browser before trying to access any of our online services.

You can now use either the smart card or email address/password with two-step verification to sign into MyEPO Portfolio, Online Filing 2.0 or Central Fee Payment.
Select verification methods: Email

If you select email, you’ll be asked to verify the email address.

Press “send email”

Get a verification email

Send a verification email to s***5@gmail.com by clicking on “Send email”.

Send email

Click on the verification link from the email (or use the code) to verify your email address.

Verify with your email

We sent an email to s***5@gmail.com. Click the verification link in your email to continue or enter the code below.

Enter a verification code instead
The last screen confirms the successful addition of two-step verification.

You can now use either the smart card or email address/password with two-step verification to sign into MyEPO services (MyEPO Portfolio, Online Filing 2.0, Central Fee Payment).
4. Change your EPO account settings

You can change your account settings. These changes include first name, last name, preferred language, email address and adding or removing two-step verification methods.

The account page can be accessed here: http://ciam.epo.org/account

Clicking on the account page will bring you to the sign in page.
After giving email address and password, or smartcard, you reach the Account settings page.

By clicking on "unblock settings", and entering the two-step verification code, you will be able to change your account details.