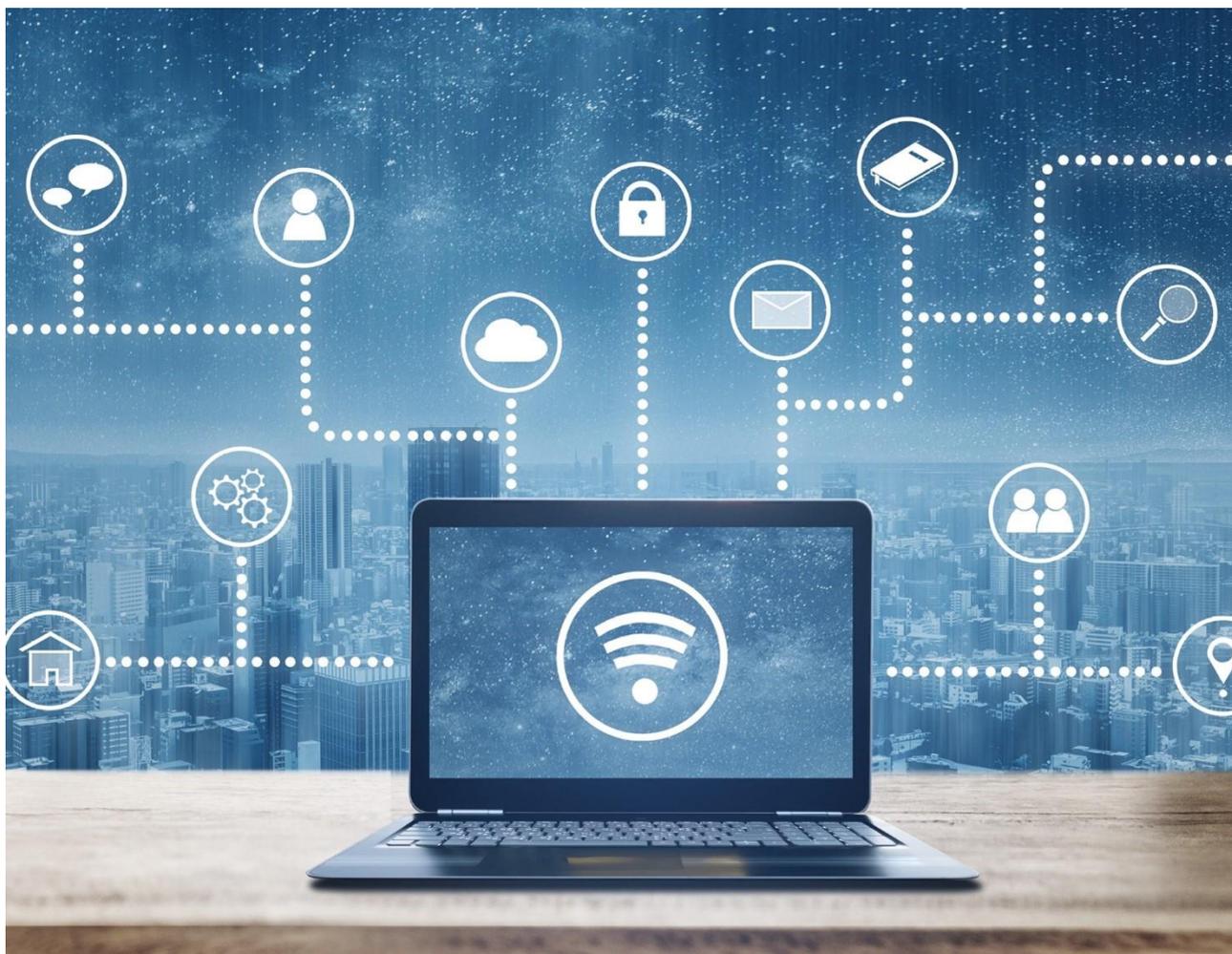


# MyEPO

Feature guide: accessing your portfolios and documents

Last update: March 2025



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### 1. Introduction

With MyEPO you can view public information about any published EP, UP or Euro-PCT application, including applications that aren't part of your company's portfolios. You can also request certified copies, transfer of rights and register licences.

Your company administrator can also grant you permission to view your company's portfolios so you can access your digital files, submit requests and replies about the applications, and interact online with examiners during a live consultation.

The **Applications and patents** area of MyEPO makes it easy for you, and in this feature guide we provide an overview of how it works.

To guide you further, we have also published some [frequently asked questions \(FAQs\)](#), and you can always contact us at [epo.org/support](http://epo.org/support) or your key account manager if you're still not sure about something.

### 2. Working with your portfolios and documents

#### 2.1 Get access to your portfolios of applications

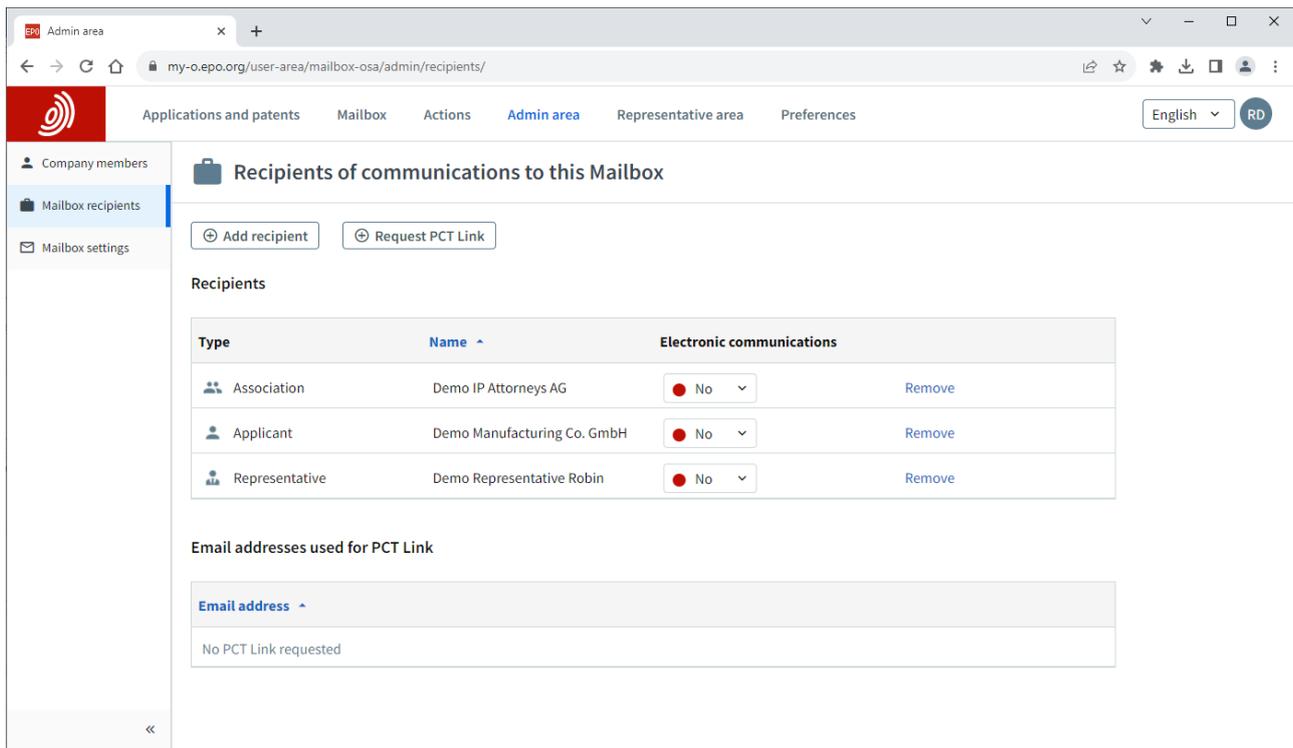
All users of MyEPO have access to the **Applications and patents** area and you can view public information about any published EP, UP or Euro-PCT application, including applications that aren't part of your portfolios. You can also request certified copies, transfer of rights and register licences.

In addition, you can view both public and non-public information about the applications in your company's portfolios, but first your company administrator must set up recipients and grant permissions as follows.

*If you don't know who your company administrator is, please contact us at [epo.org/support](http://epo.org/support) or ask your key account manager.*

As a company administrator, you first go the **Admin area** and use the **Mailbox recipients** tab to request to add "recipients" for whom electronic communications can be sent to the company mailbox and whose portfolios can be accessed in MyEPO.

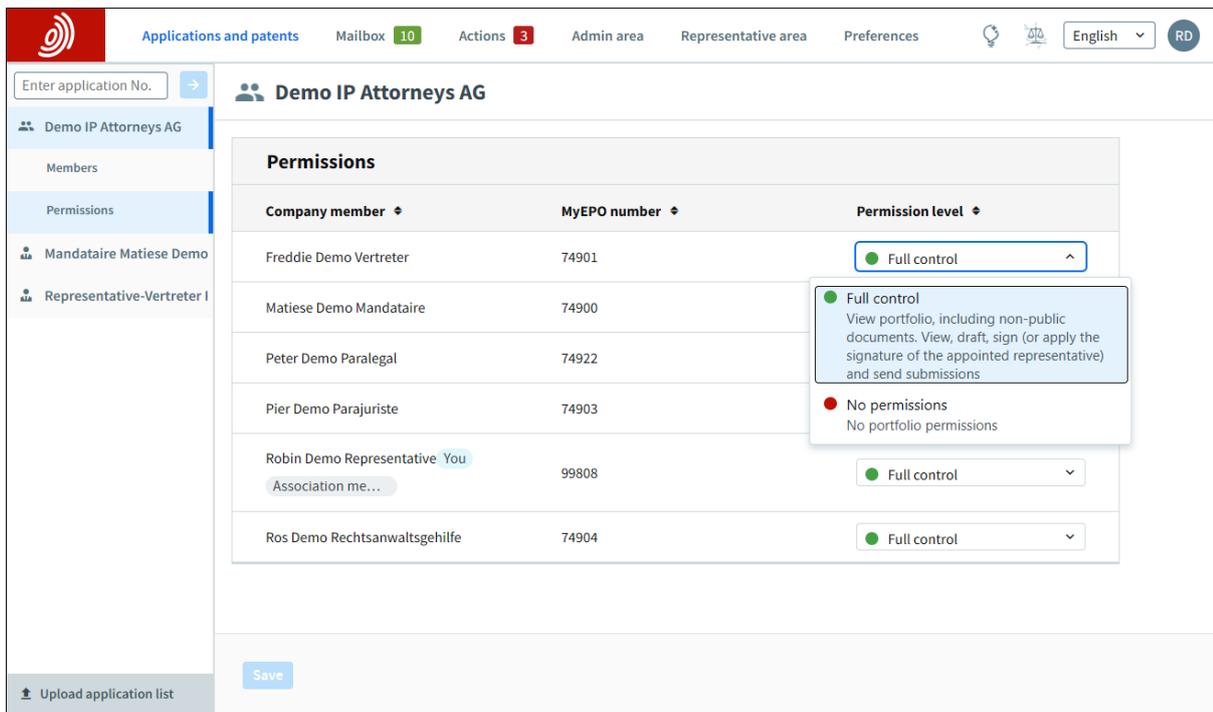
A “recipient” can be a European representative, an association of European representatives, a lawyer or a self-representing party (applicant, proprietor, opponent/intervener or appellant).



The EPO will check each request to add a recipient, which may take several working days.

Once your request has been validated, all recipient portfolios will appear in the **Application and patents** area.

As company administrator you can select a recipient’s portfolio and use the **Permissions** option to identify which users within your company can access the portfolio.



When you grant “Full control” to a user, they will be able to

- See applications for the representative or association, including unpublished applications.
- See documents for those applications, including non-public documents.
- Perform procedural actions and submit requests for the applications: draft submissions and fee payments, sign and send to the EPO.

For more information on MyEPO companies and users, please see the [feature guide on managing user access in MyEPO](#).

## 2.2 Work with your portfolios

In the **Applications and patents** area of MyEPO, you can enter the number of any EP, UP or Euro-PCT application on the left-hand side to access public information about that application, request certified copies, transfer of rights and register licences.



On the left-hand side you can also see the list of your company's application portfolios for which you have been granted access by your company administrator (see section 2.1). When you select a portfolio, you can view the list of applications in that portfolio.

App number	Applicant	Date of filing	Procedure	IPC code	PCT number	PCT publ. date	EP publ. date
EP18160515.5	Demo IP Attorneys AG	07.01.2019	Search/Examination	H01R 1352	No data	No data	10.07.2019
EP20173873.9	70880PEP Demo Manufacturing Co. GmbH	11.05.2020	Search/Examination	G06F 16532	No data	No data	02.06.2021
EP20193077.3	Demo Demo Manufacturing Co. GmbH	27.08.2020	Search/Examination	H01L 23485	No data	No data	22.09.2021
EP21201100.1	Demo Demo Manufacturing Co. GmbH	06.10.2021	Search/Examination	No data	No data	No data	No data
EP16001180.5	DEMO A3 Demo Manufacturing Co. GmbH	24.05.2016	Search/Examination	G06F 1750	No data	No data	30.11.2016
EP16001095.5	DEMO A5 Demo Manufacturing Co. GmbH	13.05.2016	Search/Examination	F16F 709	No data	No data	07.12.2016
EP20193078.1	DEMO A8 Demo Manufacturing Co. GmbH	27.08.2020	Search/Examination	B25J 916	No data	No data	16.06.2021
EP21197681.6	Demo Clar Demo Manufacturing Co. GmbH	06.12.2012	Search/Examination	G06F 314	No data	No data	30.03.2022
EP18160515.5	Matthias DPMA Wor Demo Representative,	07.03.2018	Search/Examination	E04G	No data	No data	12.09.2018

There are smart filters that prevent unauthorised users from seeing non-public applications.

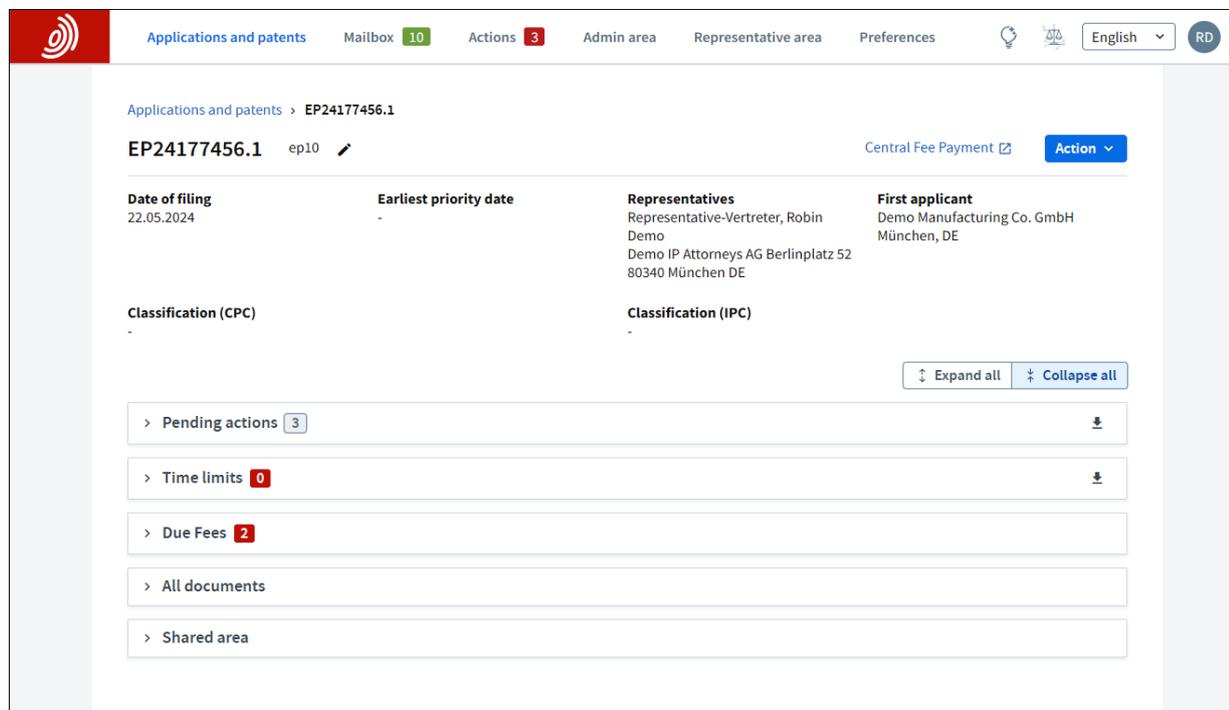
You can search and filter applications, and perform actions on one or more of the applications:

- Download information about the applications to a CSV file that you can open in Excel or upload to your IP management systems.
- Submit procedural requests about the applications, such as change of representation.

For more information on submitting procedural requests about applications, please see the [feature guide on submitting procedural requests](#).

## 2.3 Work on an application

When you click on an application number in the **Applications and patents** area, you immediately see key public information about the application and there are direct links to the corresponding records in Central Fee Payment, Espacenet and the Register where applicable.



The screenshot shows the MyEPO interface for application EP24177456.1. The top navigation bar includes 'Applications and patents', 'Mailbox 10', 'Actions 3', 'Admin area', 'Representative area', 'Preferences', 'English', and 'RD'. The main content area displays the application number 'EP24177456.1' with a search icon and a 'Central Fee Payment' link. Below this, there are sections for 'Date of filing' (22.05.2024), 'Earliest priority date' (none), 'Representatives' (Representative-Vertreter, Robin Demo, Demo IP Attorneys AG Berlinplatz 52, 80340 München DE), and 'First applicant' (Demo Manufacturing Co. GmbH, München, DE). There are also sections for 'Classification (CPC)' and 'Classification (IPC)'. At the bottom, there are expandable panels for 'Pending actions 3', 'Time limits 0', 'Due Fees 2', 'All documents', and 'Shared area'. An 'Action' dropdown menu is visible in the top right corner of the application details area.

There is an **Action** pull down menu which allows you to perform procedural actions related to the application. Any user of MyEPO can request transfer of rights, registration of licenses and other rights and request certified copies for an application.

In addition, if you are a company member from the representing party and have been granted access to the corresponding application portfolio by your company administrator, you can also perform additional procedural actions, such as requesting change or withdrawal of representation, withdrawing the application, and editing bibliographic data.

For more information, please see the [feature guide on submitting procedural requests](#).

Below there is a series of panels appear that you can expand or collapse.

The **Pending actions** panel is available to all users of MyEPO. It shows a list of submissions that have been started but not yet completed and their status. You can download the list to a CSV file and you can continue any of the actions.

For more information about the different actions in progress that you can work on, please see the [feature guide on replying to communications with deadlines](#) and the [feature guide on submitting procedural requests](#).

The **Time limits** panel is only available to company members that have been granted access to the corresponding application portfolio by the company administrator. It shows the complete list of

pending actions that the EPO is expecting you to perform that have a due date. You can download the list to a CSV file.

The **Due fees** panel is available to all users of MyEPO and shows information about pending fees, with a direct link to Central Fee Payment so you can process them.

The **All documents** panel is available to all users of MyEPO and allows you to view the digital files associated with the application. There are smart filters that prevent unauthorised users from seeing non-public documents. You can select, view, print, and download each document.

The **Shared area** panel is only available to company members that have been granted access to the corresponding application portfolio by the company administrator.

You can use the shared area to upload, review, edit and annotate documents together with examiners during a live consultation on European proceedings. This real-time interaction increases quality, transparency as well as efficiency. For more information, please see the [feature guide on the shared area](#).