MyEPO Services

Feature guide: best practices for company administrators

Last update: April 2026

Content

1. Introduction

This guide provides practical best practices for company administrators using MyEPO Services. It focuses on day-to-day management tasks including user administration, access rights configuration, and company portfolio oversight.

The guide covers common administrative scenarios such as onboarding and offboarding employees, managing access permissions, handling associations, claiming refunds of fees, and coordinating with Online Filing 2.0. Drawing on real operational use cases, it aims to help company administrators manage MyEPO efficiently, consistently, and securely while avoiding common pitfalls.

Whether you are new to MyEPO Services or an experienced administrator, this guide is designed to support smooth collaboration across teams. If you have questions or would like to provide feedback, please contact us at epo.org/support or through your key account manager.

2. Onboarding new company members

2.1 Accepting new company members

Your MyEPO company administrator should provide the following guidance to all newcomers:

Option 1: Transfer an existing EPO account

If the newcomer has an EPO account from a previous company, they should transfer it. This is only possible if they still have access to their previous account's email or phone option.

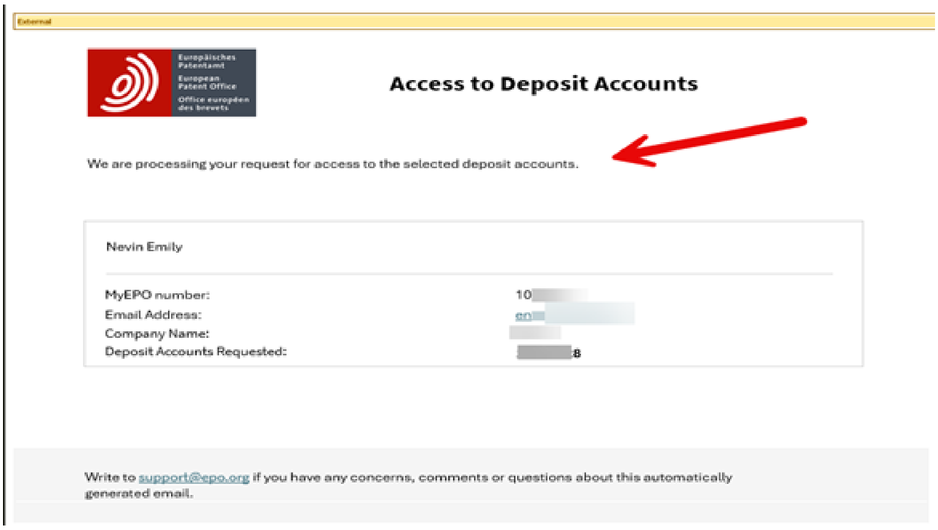
Option 2: Create a new EPO account

If transferring is not possible, the newcomer should:

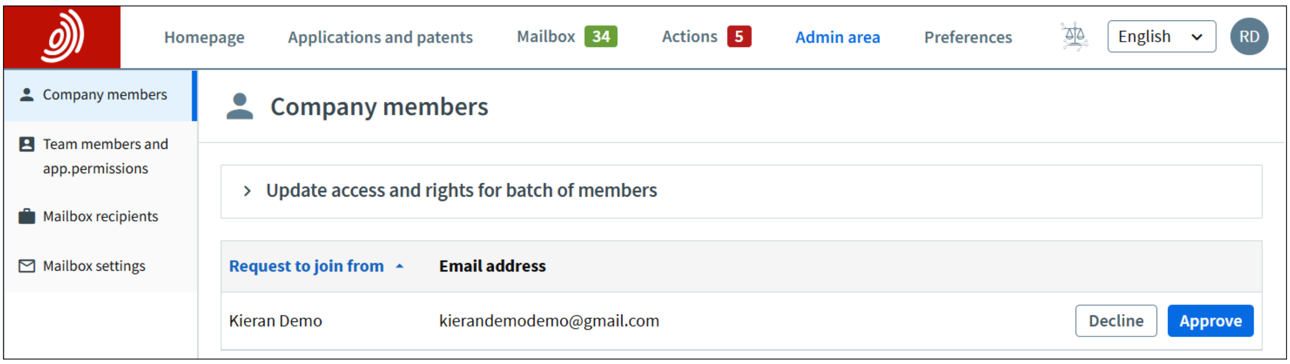
- Set up a new EPO account
- Select the **join an existing company** option
- Enter the MyEPO company name (the administrator will provide this)
- This makes them a pending company member in MyEPO

Linking deposit accounts

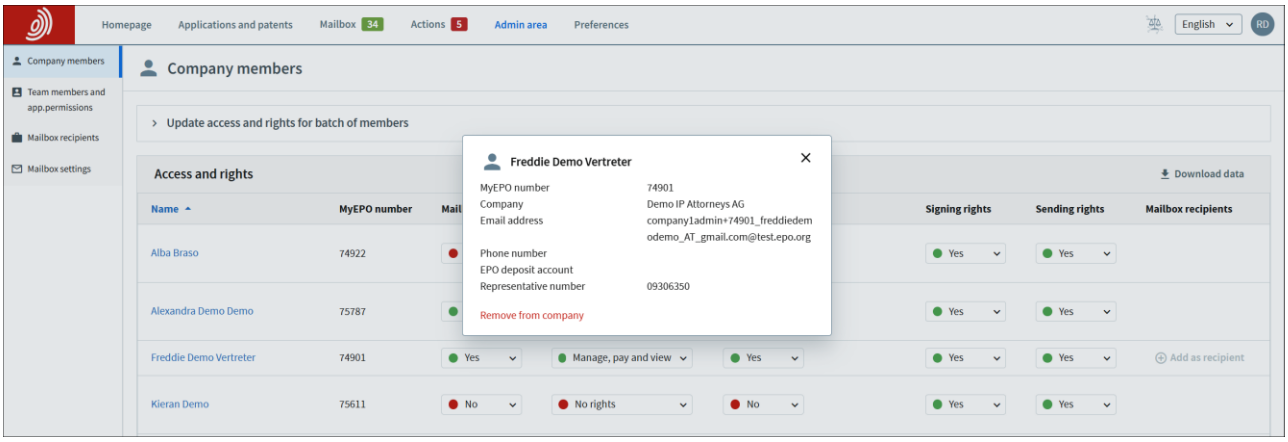
The administrator should instruct the newcomer to enter the company deposit account to be linked to their profile. When the newcomer completes this step, the administrator(s) will receive a confirmation email indicating the request is being processed.



The administrator can then accept them as a company member.



After accepting a new member, the administrator should verify whether the employee requested the deposit account link during setup. If no EPO confirmation was received, check this by clicking on the company member. If the deposit account was not linked, send a request to epo.org/support to link their deposit account to their EPO account.

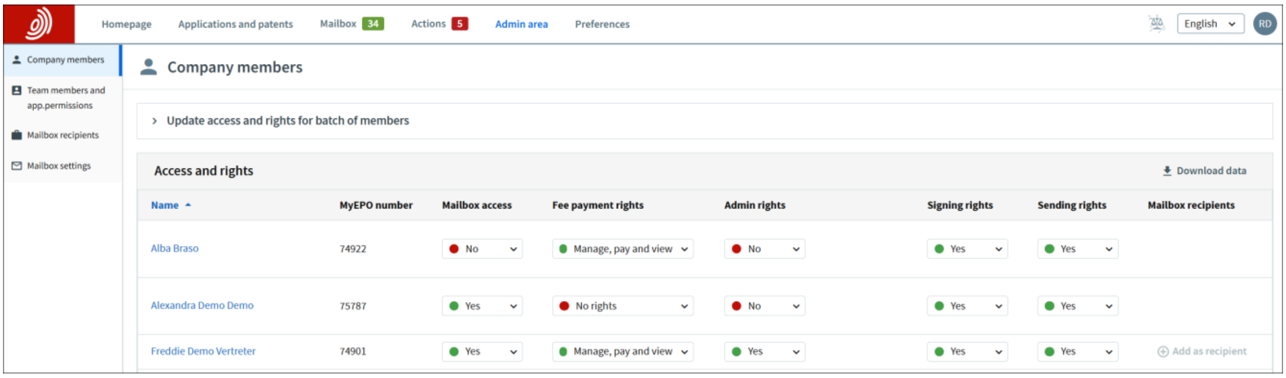


If the new employee is also a professional representative, the administrator should contact epo.org/support to link the professional representative number to the attorney's EPO account.

Important Note: If you have added an existing EPO account to your company in MyEPO, verify that the profile has the correct deposit account number linked to it. For attorneys, also confirm that their professional representative number is linked. You can check this by clicking on the company member, as shown above.

2.2 Assigning access rights in MyEPO

Access rights are assigned under **Admin area** => **Company members**.



MyEPO number: the individual's account number. If an individual has two (or more) accounts in your MyEPO company you may want to remove one of them if so, check first that the account you are keeping has the role numbers (representative and deposit account) attached to it.

Mailbox access: if you give your colleagues (or your B2B account) access to process incoming mail, when you have done this, they will then see the Mailbox tab at the top of the screen when they next log in. This is where they can then access the incoming mail.

Fee payment access: the access to fee payment only refers to the access to Central Fee Payment. There are currently no cross checks in Online Filing 2.0 as to which deposit account is linked to your profile, but as products develop it is advisable to keep the link to these roles up to date, as advised earlier in the process.

Admin rights: we advise that you have multiple MyEPO company administrators who can add and remove colleagues to your systems as well as give them access rights.

Signing and sending rights: allows you to restrict rights to sign and send actions performed in MyEPO.

Like Online Filing 2.0 some companies do not want certain employees (attorneys, paralegals, secretaries, etc.) to be able to sign and do not want certain employees to send actions to the EPO.

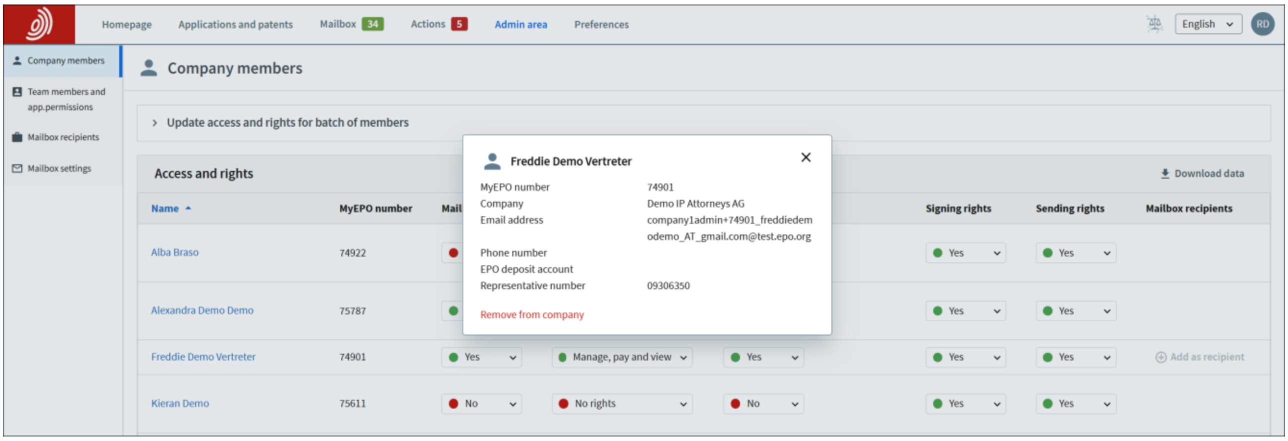
Some companies who have given permission to employees (attorneys, paralegals, secretaries, etc.) to view a portfolio under **Applications and patents**, also use this function, if they want to make sure that employees do not send actions via MyEPO, without the necessary workflow being in place.

2.2.1 Managing individual user access rights

The administrator can check each employee's profile under **Company members** by clicking on the person's name. This allows you to verify whether the representative number and deposit account have been linked to their profile.

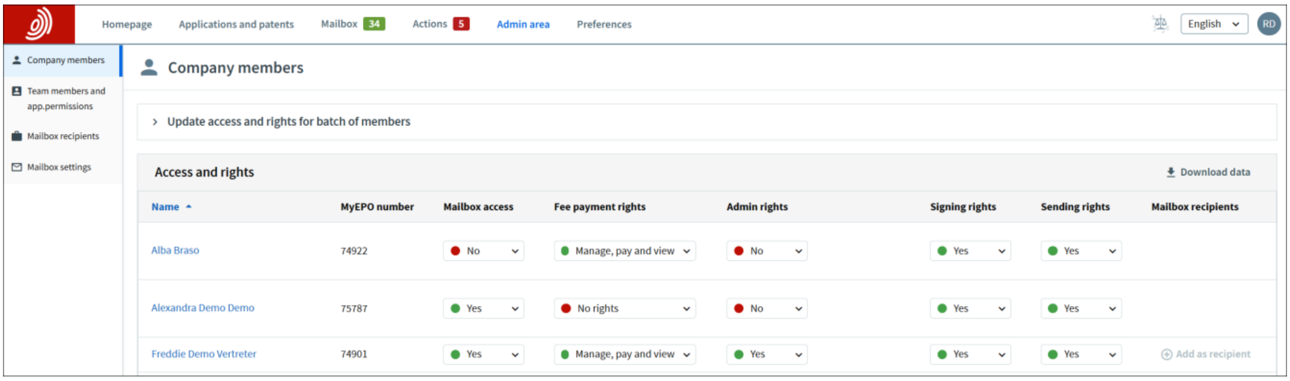
As shown in the screenshot below, in cases of duplicates or employee departures, the administrator can immediately remove an employee's account (and therefore their access) using the 'Remove from company' option.

Important Note: When you remove a company member, this removes them as a Mailbox recipient and unlinks the deposit account number from their account. In cases of duplicates, ensure you remove the correct EPO account (the one without the required role codes) and verify that the individual is still a recipient where needed. This is a good cross-check to confirm that the correct role codes/numbers are attached to the employee's EPO account.



2.2.2 Managing access rights for groups of users

For larger companies, managing individual user access can be challenging. MyEPO provides an option to view and make bulk updates to access rights by clicking on **download data**.

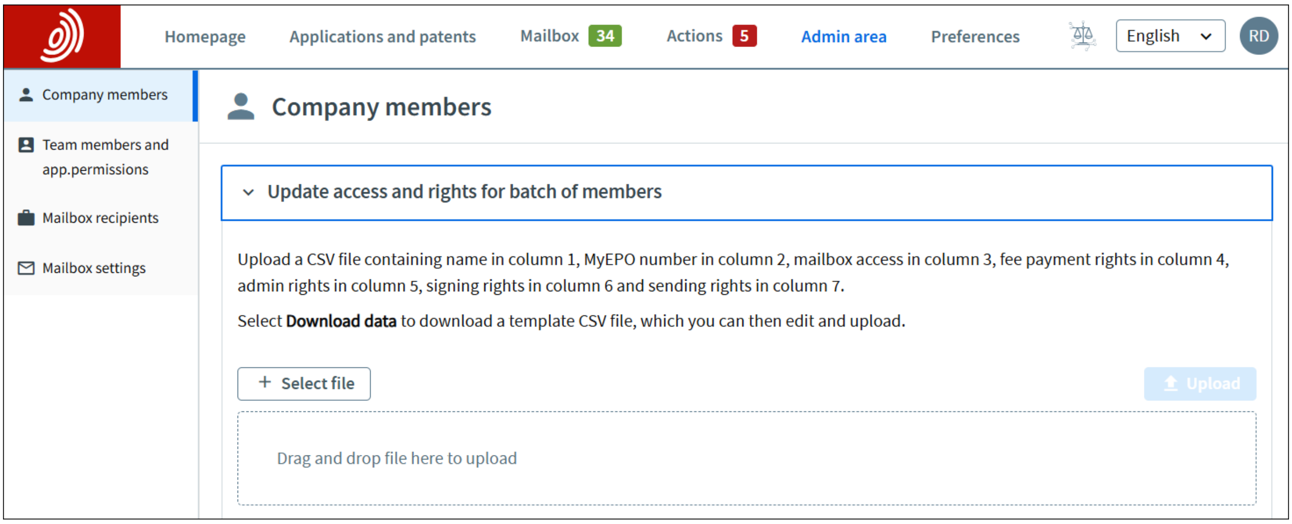


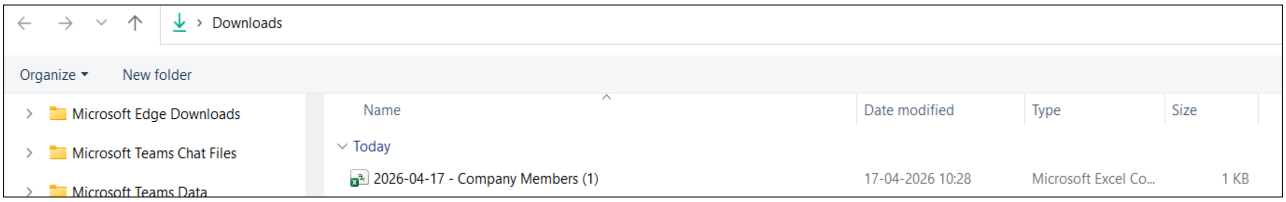
This produces a CSV file that gives you an overview of all users.

Name	MyEPO number	Mailbox access	Fee payment rights	Admin rights	Signing rights	Sending rights
Alexandra Demo Demo	75787	Yes	No	No	Yes	Yes
Freddie Demo Vertreter	74901	Yes	Manage, pay and view	Yes	Yes	Yes
Kieran Demo	75611	No	No	No	Yes	Yes
Matiese Demo Mandataire	74900	No	No	No	Yes	Yes
Pier Demo Parajuriste	74903	No	View	No	Yes	Yes
Robin Demo Representative	99808	Yes	Manage, pay and view	Yes	Yes	Yes
Ros Demo Rechtsanwaltsgehilfe	74904	No	Manage, pay and view	Yes	Yes	Yes

To make bulk updates:

- Download the CSV file
- Make the necessary updates to the file
- Under **Company members**, click **'Update access and rights for bulk members'**
- Upload the amended file
- The changes will be applied in MyEPO



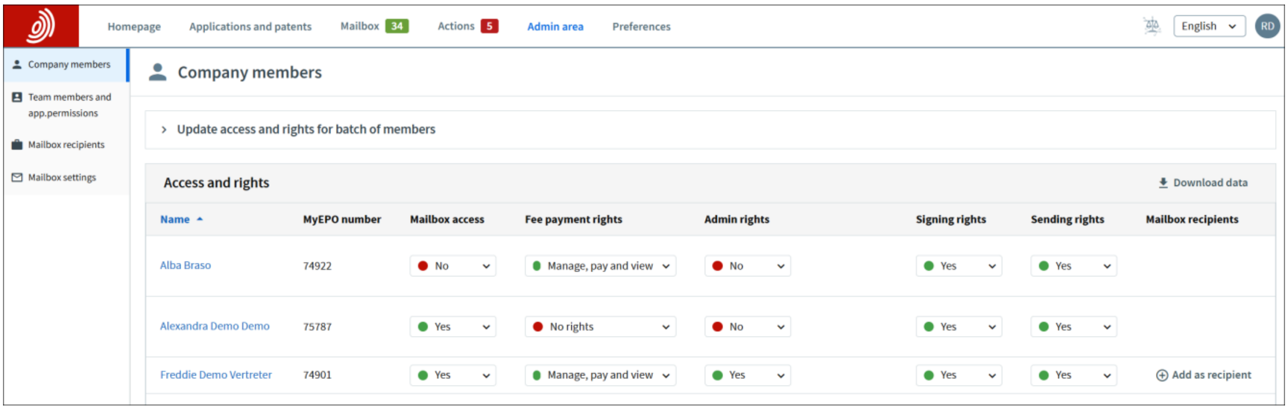


Important Note: An upcoming improvement will expand the downloaded data from **Company members** to include individual information about deposit accounts and representative numbers. For security reasons, this information cannot be updated when re-importing the file into MyEPO. However, you will be able to see if it is missing and contact support to have it updated.

2.2.3 Next steps for the company administrator

Add representatives as recipients immediately

This can be done next to their profile in **Company members**. You need to scroll to the right to see this option.



The attorney is then added immediately as an active recipient in the Mailbox. Note that this also adds the attorney to the list of portfolio owners under **Applications and patents**, as recipients form the list of portfolio owners.

Important note: The **add as recipient** request might not be allowed if the individual is still linked as a recipient to the Mailbox at their previous company. In this case, the attorney needs to contact the previous company and request removal as a recipient. If there are any issues, contact epo.org/support or your key account manager for assistance.

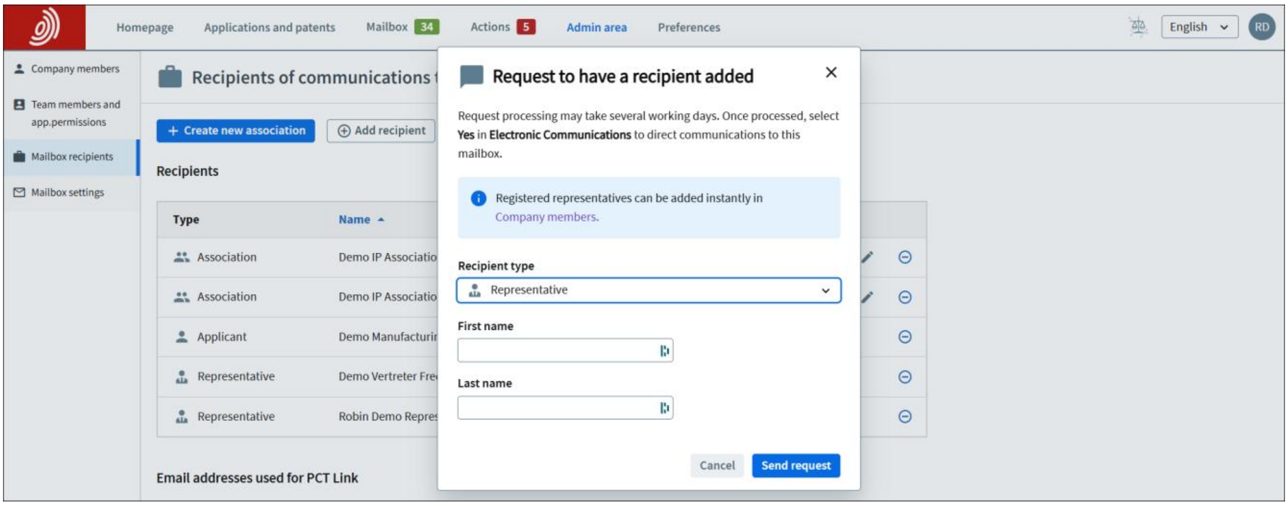
Why add an individual attorney as a recipient if we file as an association?

In certain circumstances, such as mistakes or when a company transfers files to your company but names the individual instead of the association, you will receive communications addressed to the individual. This way, you will still receive them electronically in your Mailbox. This also allows you to check the individual's portfolio when they join or leave your company to see whether there are files linked to them that should be transferred.

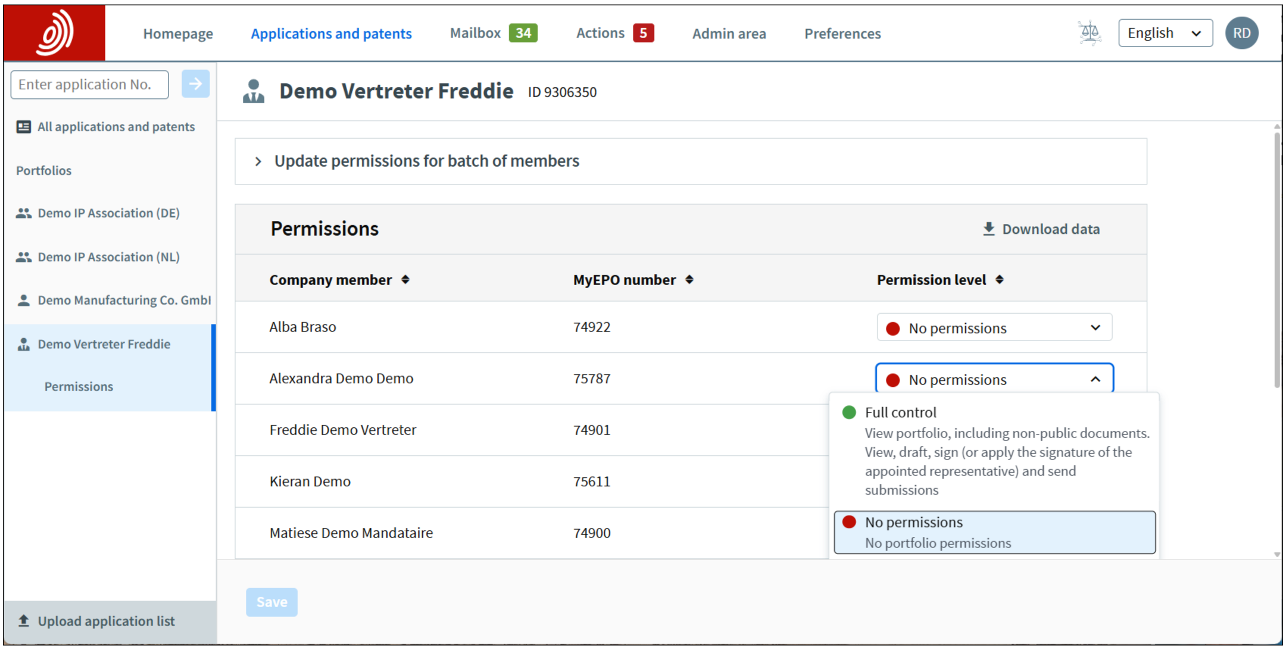
If you have not added the representative number to an attorney's profile as explained above (or they do not have an EPO account), the **add as recipient** option will not be available. However, you can still add them as a Mailbox recipient using the traditional method. In the Admin Area, choose **Mailbox**

recipients and add the name of the representative, association, or applicant. This is not an automated process and will take longer. It sends a request to the EPO, who will check the person's credentials and link them to your Mailbox. The administrator needs to sign in again and confirm that they wish to receive electronic mail.

Important Note: If you are a legal practitioner with files in your name, you should be added as a representative.



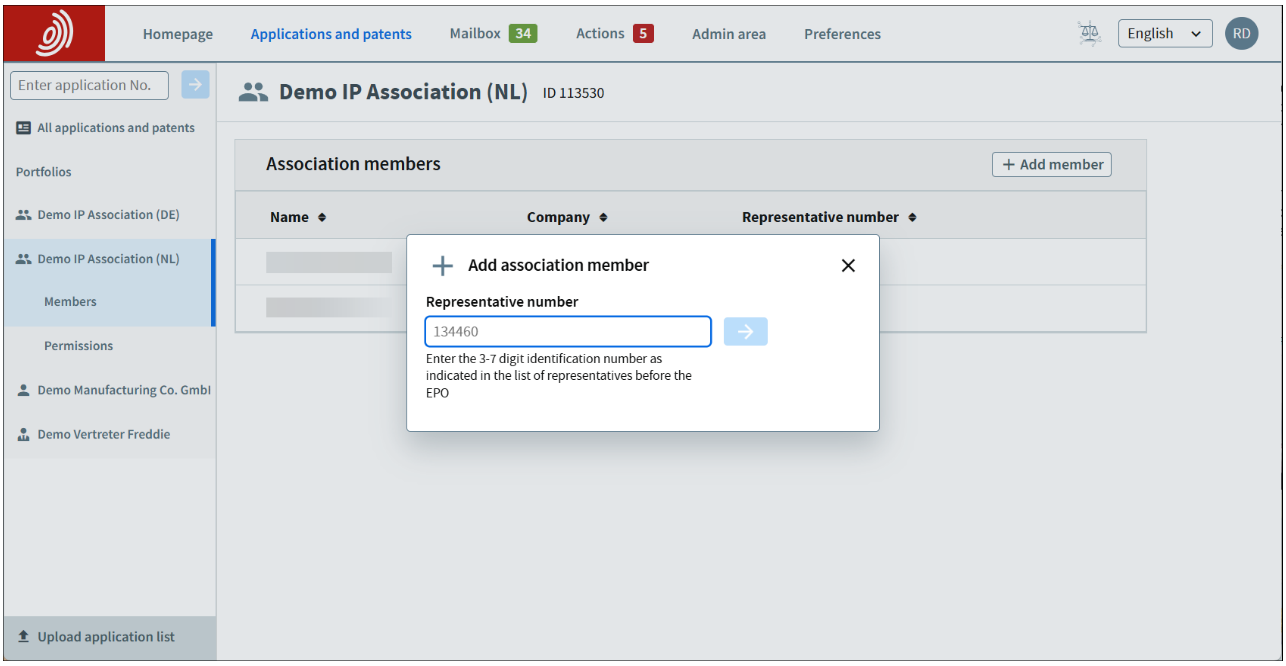
The administrator should then go to **Applications and patents** and give themselves permission to view the attorney's portfolio. This allows you to check whether they have files linked to them from their previous company.



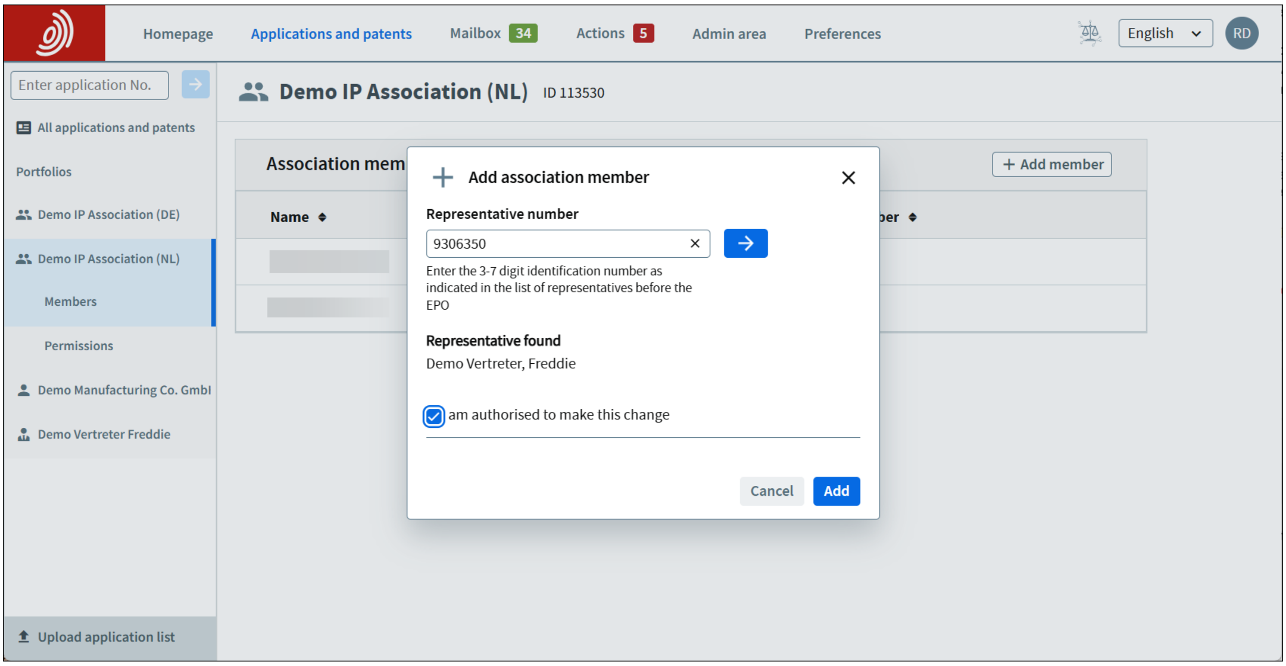
If they do, you should either contact the attorney's previous company to transfer the files to one of your attorneys or the association via Online Filing 2.0, so that you do not receive their mail in your Mailbox. Alternatively, you can transfer them back to the company using MyEPO or Online Filing 2.0.

Add attorneys to an association (where relevant)

The administrator should go to **Applications and patents** and choose association members. Then click on **+ Add association member**, enter the representative number, and click the arrow.

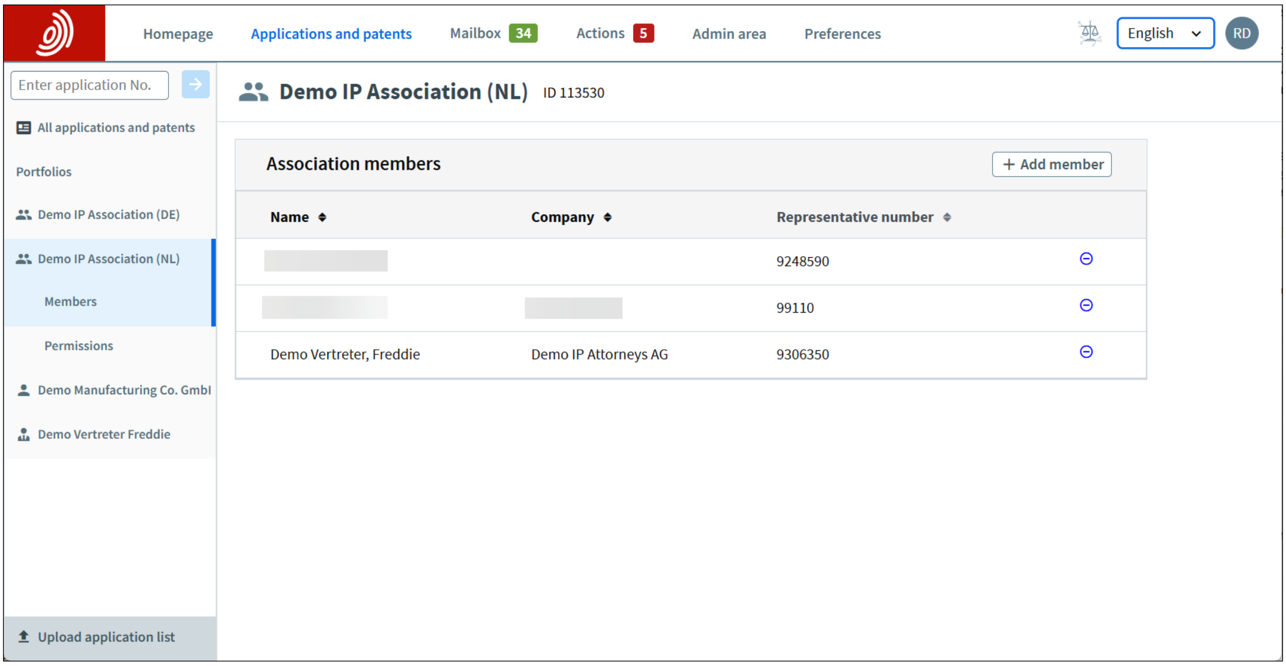


This will show you which attorney they are adding. Confirm that you are authorised to add this person to your association and click **add**.



One of the benefits of MyEPO self-service is that this person is immediately part of the association. You will receive a confirmation of this update to the association in the Mailbox.

We sometimes receive questions about why a different company name is shown for some members of the association, or there is no name shown. This is usually because their EPO account does not have the representative number attached to it, or their actual account has not yet joined your company in MyEPO. The team at epo.org/support can help you correct this. However, rest assured that legally speaking, the representative with the name and number that you have added is now legally part of your association.



2.2.4 Further company administrator tasks

Granting permission to access portfolios

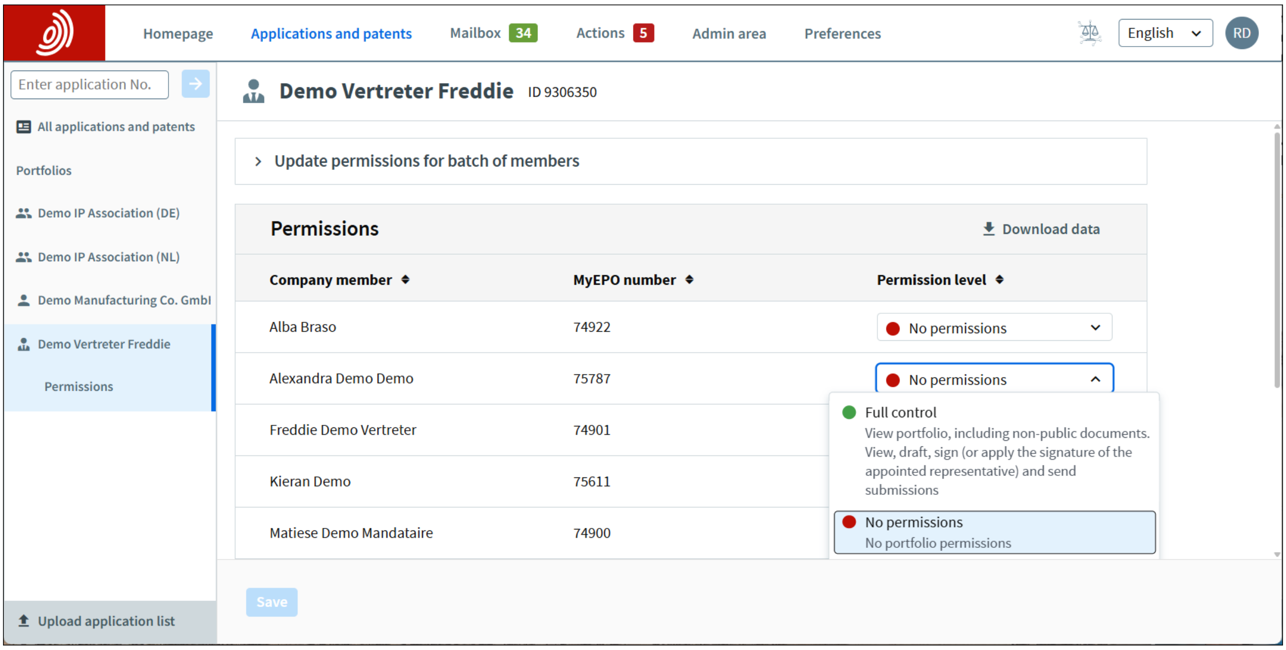
Administrators can grant permissions for users to work on company portfolios. This is useful for many reasons, such as compiling an incomplete file on non-public cases you have taken over or accessing non-public files when travelling. However, these permissions also mean that users can perform actions in MyEPO. In the case of an association, a representative can then view all cases. You may need to consider this if your company needs to maintain ethical walls.

Current solutions to manage ethical walls include:

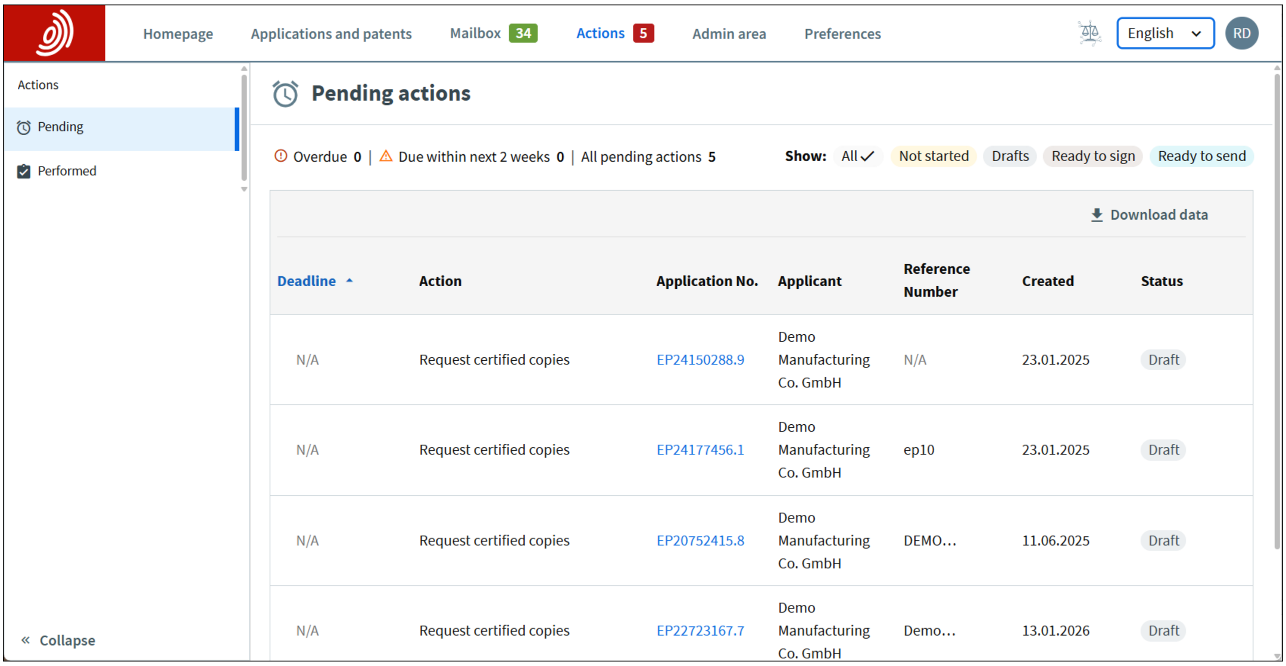
- not giving portfolio access permissions to certain attorneys
- transferring files to individual attorneys and creating a new portfolio that can be managed separately
- creating multiple associations for managing ethical wall clients

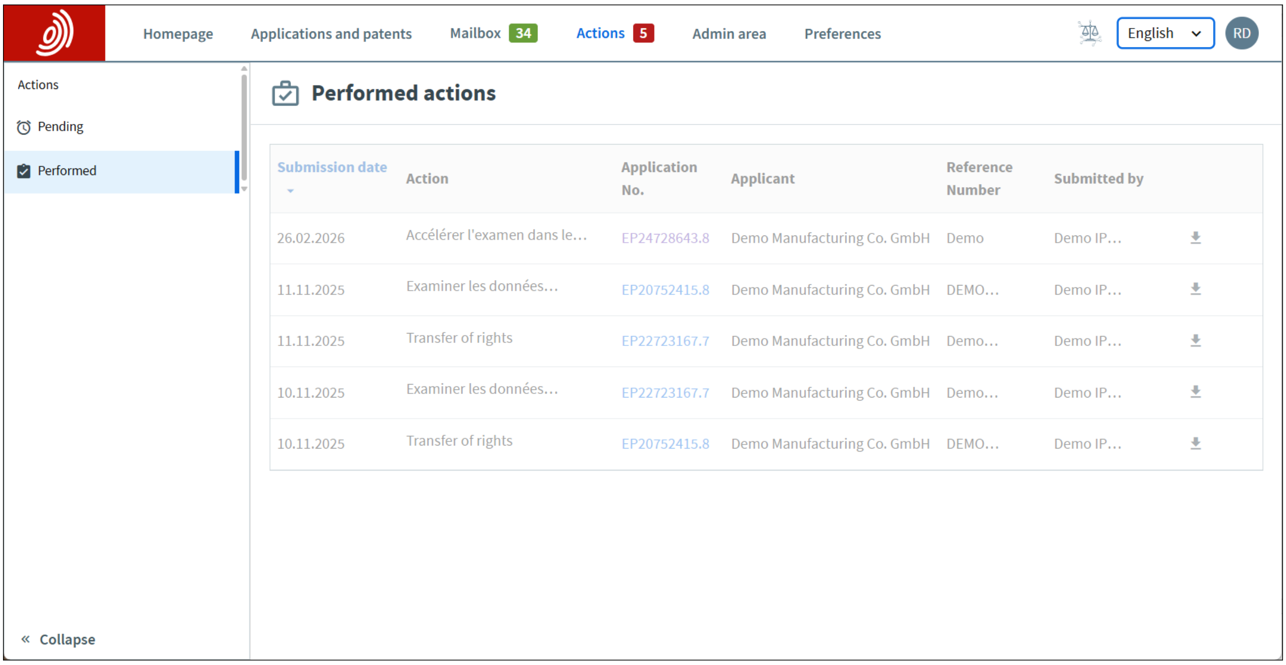
Managing actions

As mentioned above, you can manage who files which actions in MyEPO by using the signing and sending rights to potentially restrict people from filing, if your internal workflows are not yet in place.



Users with portfolio permissions can also view any pending or performed actions in these portfolios.

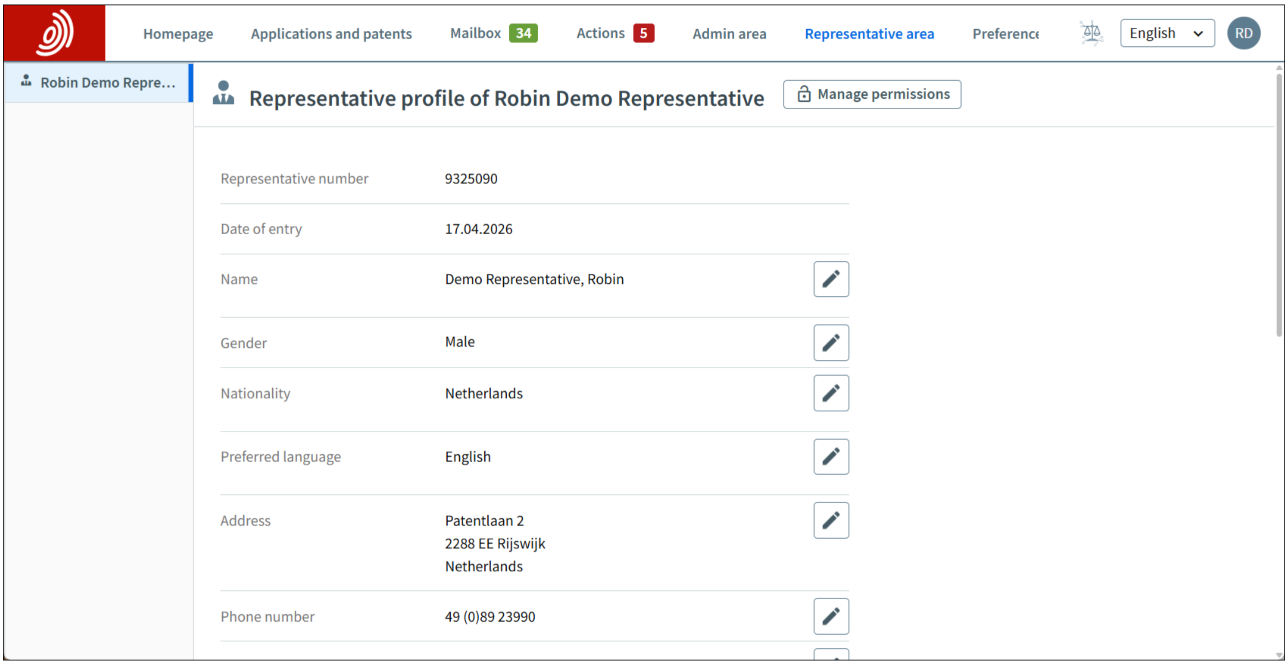




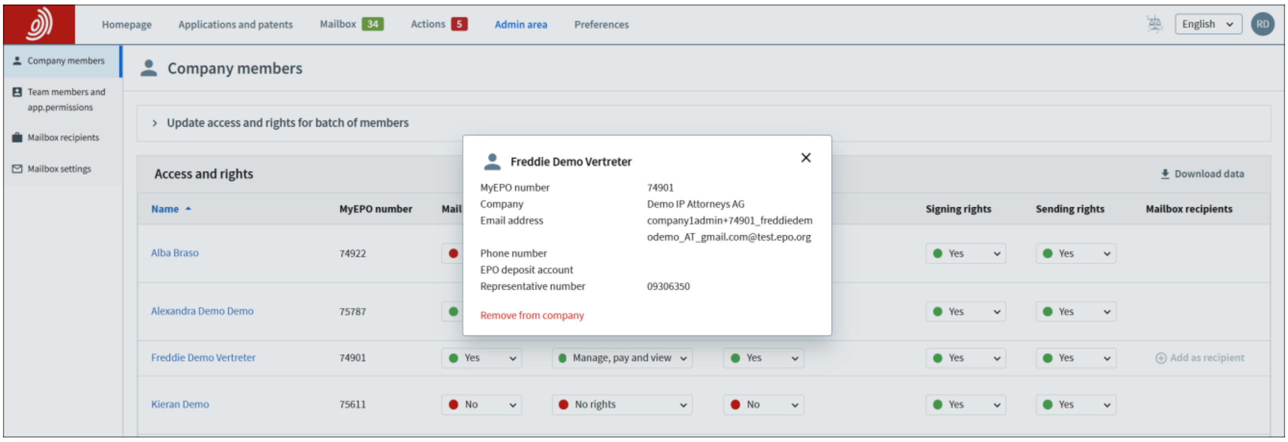
2.2.5 Accessing the representative area

Professional representatives and legal practitioners automatically have access to their **Representative area**, where they can update their entry on the list of representatives/legal practitioners. This requires that their professional representative number is linked to their EPO account.

It is possible to allow someone else to manage your details if you want to centralise this process. In this case, the representative must click on **manage permissions** and select which people can manage their details.



Important Note: If the **Representative area** tab is not visible for the professional representative or legal practitioner, this is usually because the professional representative number has not been added to their EPO account. You can check this in their company member profile. If this is the case, send a request to support to add the professional representative number to their EPO account.

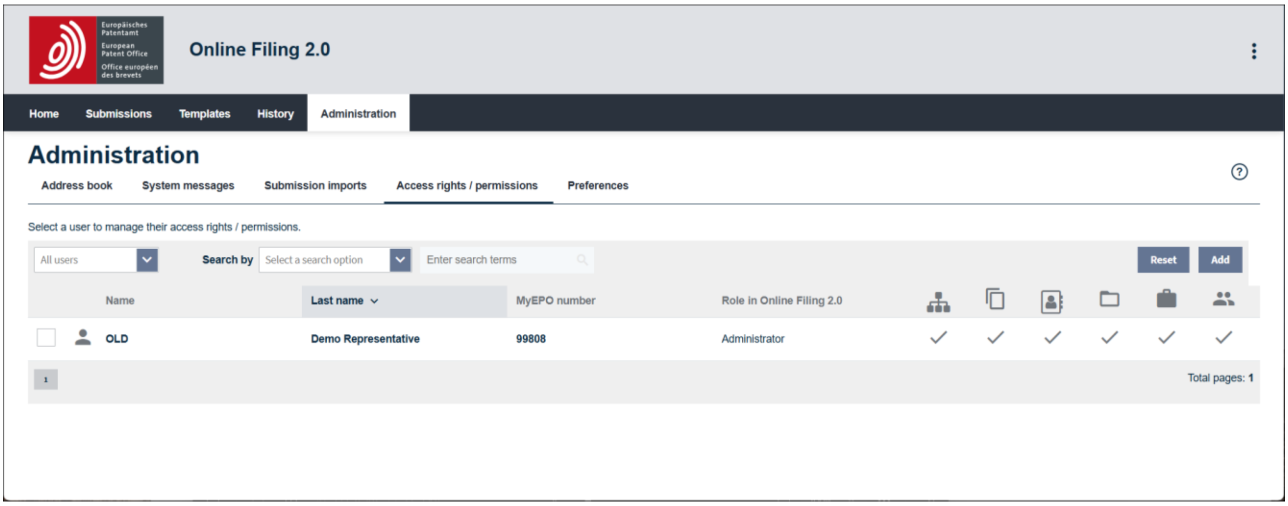


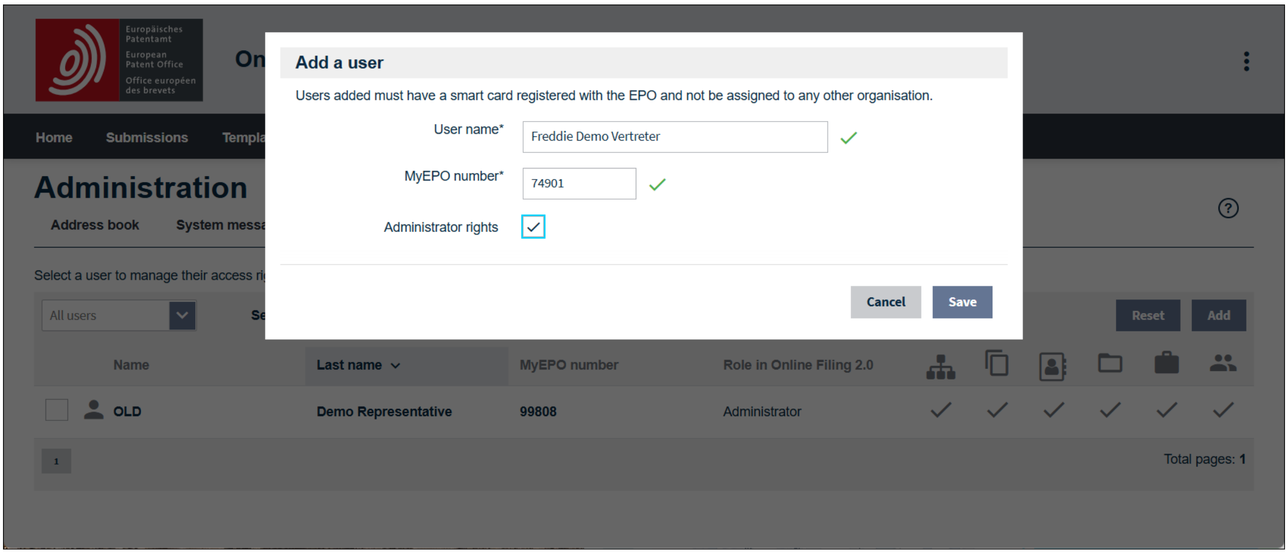
Bulk updates for multiple attorneys' details (such as when moving offices) are not yet possible in MyEPO. In these cases, it is most efficient to send a request form to the EPO's Legal Division.

Legal practitioners can also be added to this list. In cases where one person is both a professional representative and a legal practitioner, the role of the professional representative will take precedence.

2.3 Online Filing 2.0

After the user has been a company member for approximately 1-2 hours, the administrator can add the new employee to Online Filing 2.0. Go to **Access rights/permissions** and add them. The administrator should then grant the relevant access rights in Online Filing 2.0 Administration.





Online Filing 2.0 administration tips:

- Use the same administrator as you do for MyEPO
- Have multiple administrators
- Consider whether you want everybody or only selected users to be able to manage templates, address books, and submission folders when discussing your company policy

Ethical walls: You can set up restricted folders, and you can now also retrospectively manage access. However, to do this, you need someone who has been given access to the restricted folder and who can manage submission folders and has access to the folder.

3. Offboarding departing company members

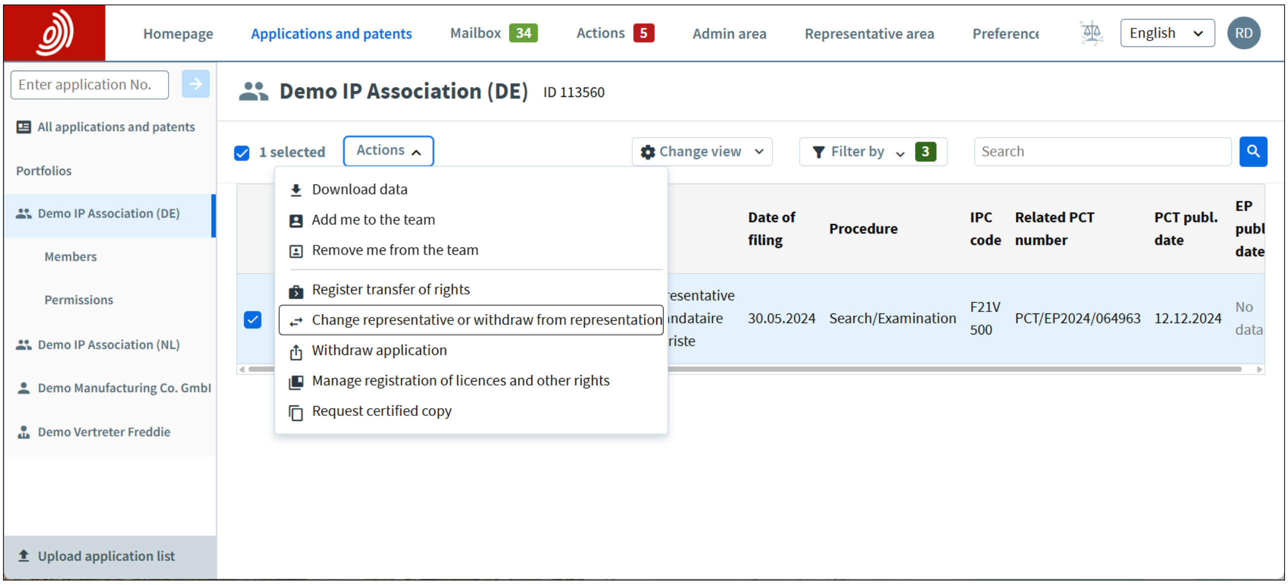
3.1 Actions for the company administrator

When an attorney or representative leaves your organisation, the company administrator must complete several actions to maintain data integrity and security. Follow these steps in sequence to ensure a smooth transition.

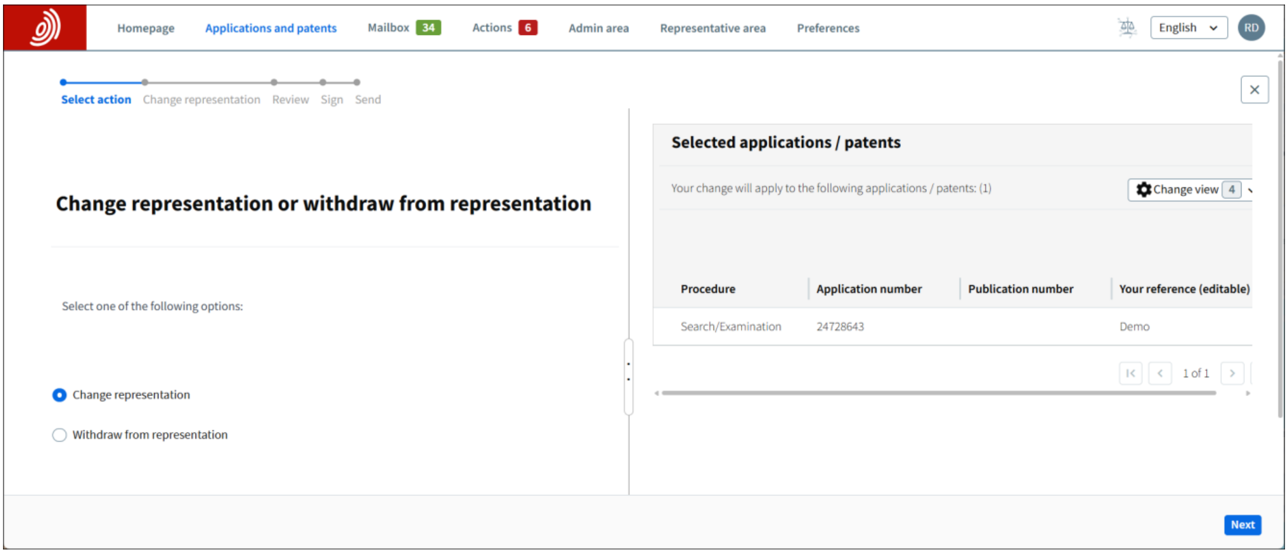
Step 1: Transfer applications and patents

First, check whether the departing attorney has any files in their portfolio:

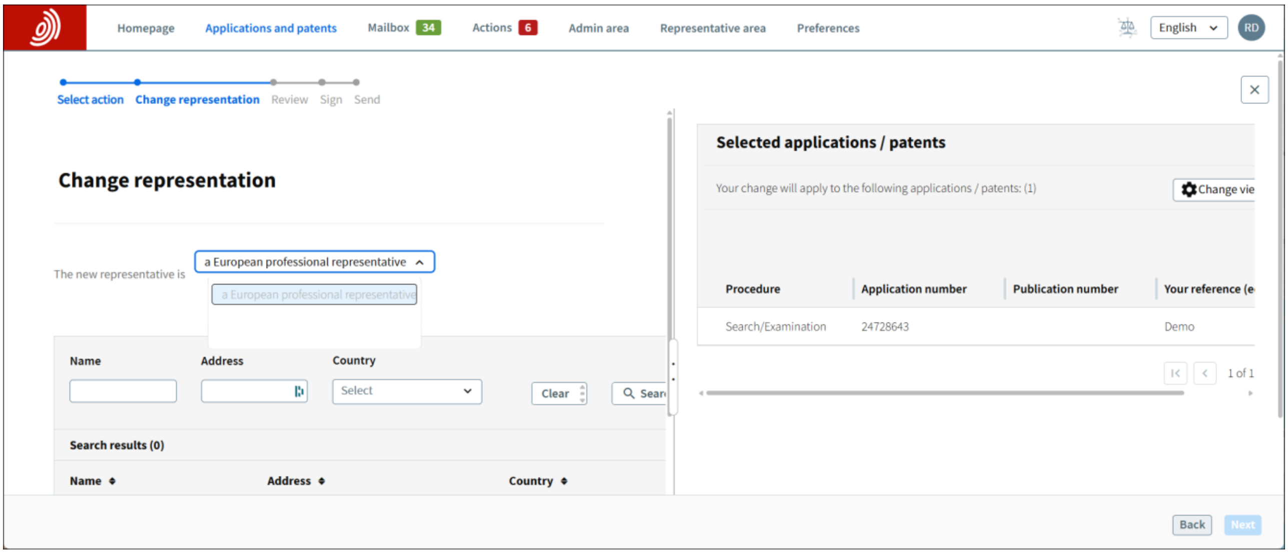
1. Navigate to **Applications and patents** (as shown in previous sections)
2. Check the attorney's portfolio to identify all files under their name
3. If files exist, transfer them immediately to another attorney or to the association. Under the **Actions** pull-down menu, choose **Change representative**



Select "**Change representation**" and click **Next**.



Select the type of entity you are looking for (representative, association, etc.). The system will process these changes automatically.



Note: Some files cannot be transferred using the method above. In these cases, you can send a list via Online Filing 2.0 to a lead file or 00000000.0 (if possible), providing the EPO with a corresponding CSV file. Discuss this process with your key account manager first.

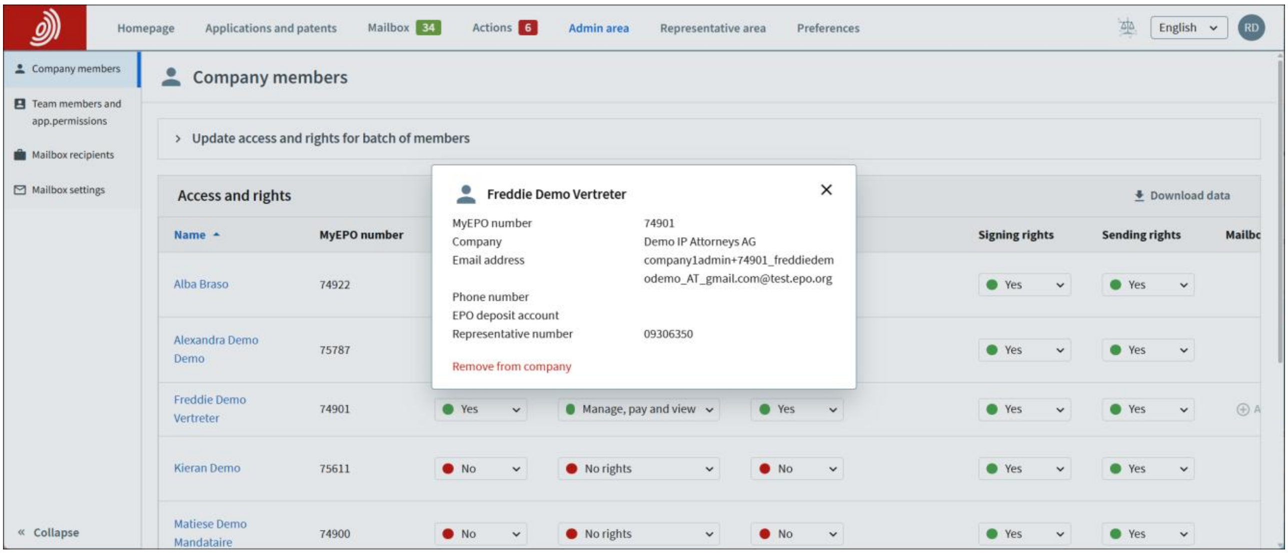
Step 2: Check for pending refunds

Before removing the leaver from the system, check whether there are pending refunds in **Central Fee Payment**. This is critical because once the person is removed, your company will lose access to any refunds linked to their individual profile.

Step 3: Remove them as company members

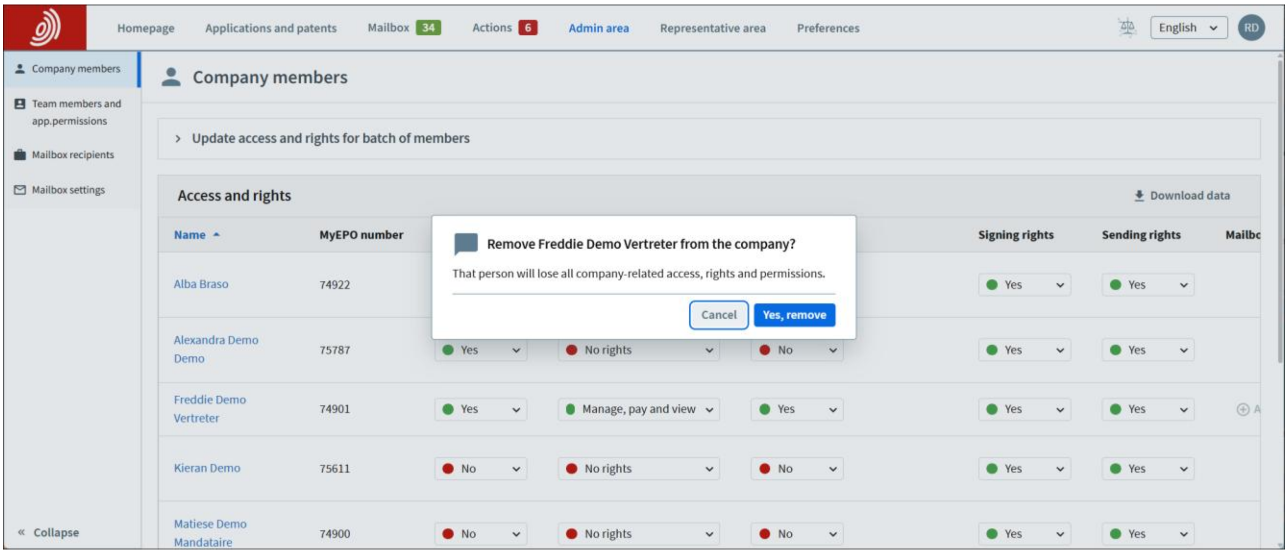
Removing the departing person as a company member will automatically remove them from the Mailbox (if they are a recipient) and remove the deposit account from their profile:

- Navigate to **Company members**
- Click on the individual you want to remove
- Select **Remove from company**



Confirm the action when prompted. The individual will be removed from the list.

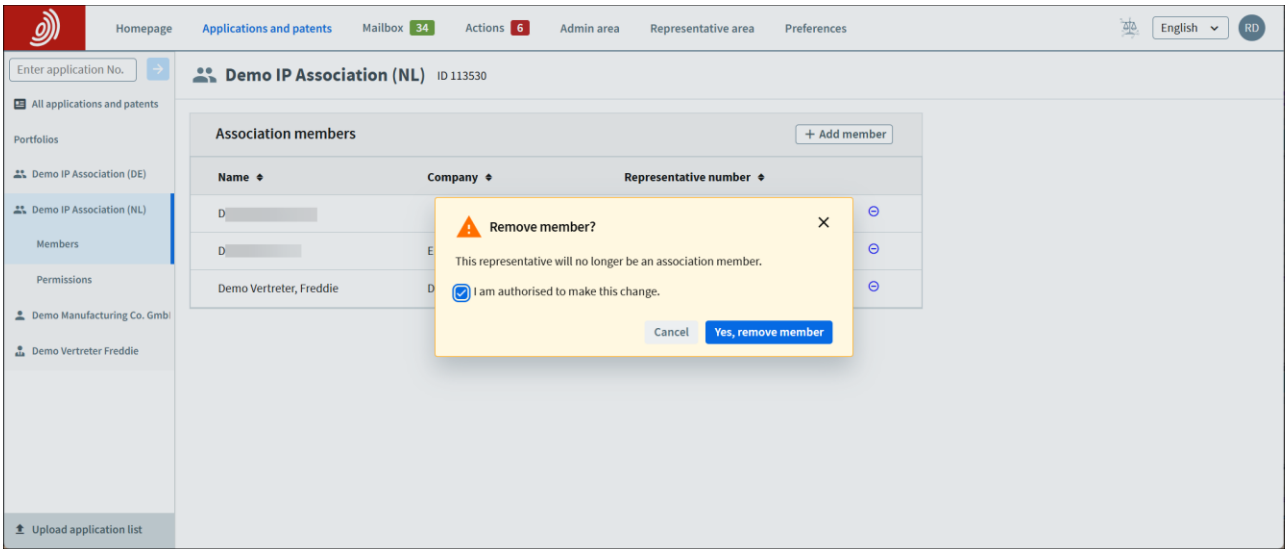
Important: Remember to check for pending refunds (see step 2) before taking this action. After removal, your company will have no access to refunds linked to the individual's profile.



Step 4: Remove them from associations (if applicable)

If your organisation works as an association, you can remove the departing person immediately:

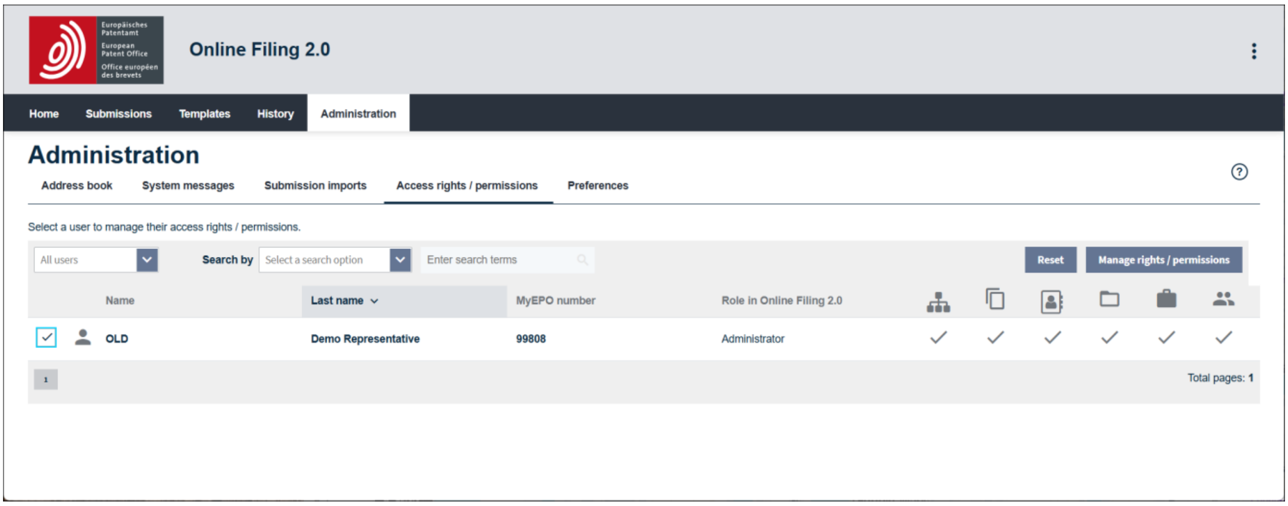
- Navigate to **Applications and patents**
- Select association **members**
- Choose the attorney you want to remove
- Click the minus (-) option next to their name
- Confirm that you wish to remove them
- They will be removed from the association members list immediately



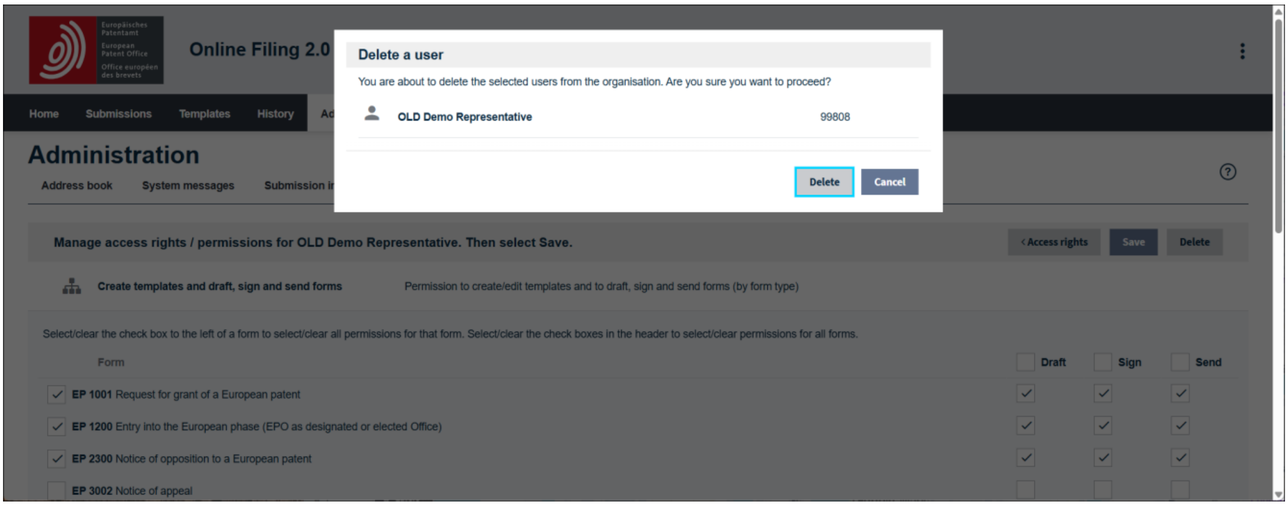
Step 5: Remove them from Online Filing 2.0

To do this:

- Open Online Filing 2.0
- Navigate to **Administration** → **Access rights / permissions**
- Select the user
- Click **Manage rights / permissions**



Then simply delete the user.



Note on ethical walls: Removing a user from Online Filing 2.0 will also remove them from restricted folder access. If the departing user has folder management rights, this may affect restricted folder permissions. Ensure that you have at least two people with folder management access rights in your restricted folders. It is recommended to always designate the same two people for this role.

Note on the list of representatives: The administrator should encourage the departing representative to update their details on the list of representatives before leaving. This can be done via the **Representative area.** Updating their status helps avoid receiving reminders and communications from the epi for someone who has left your company.

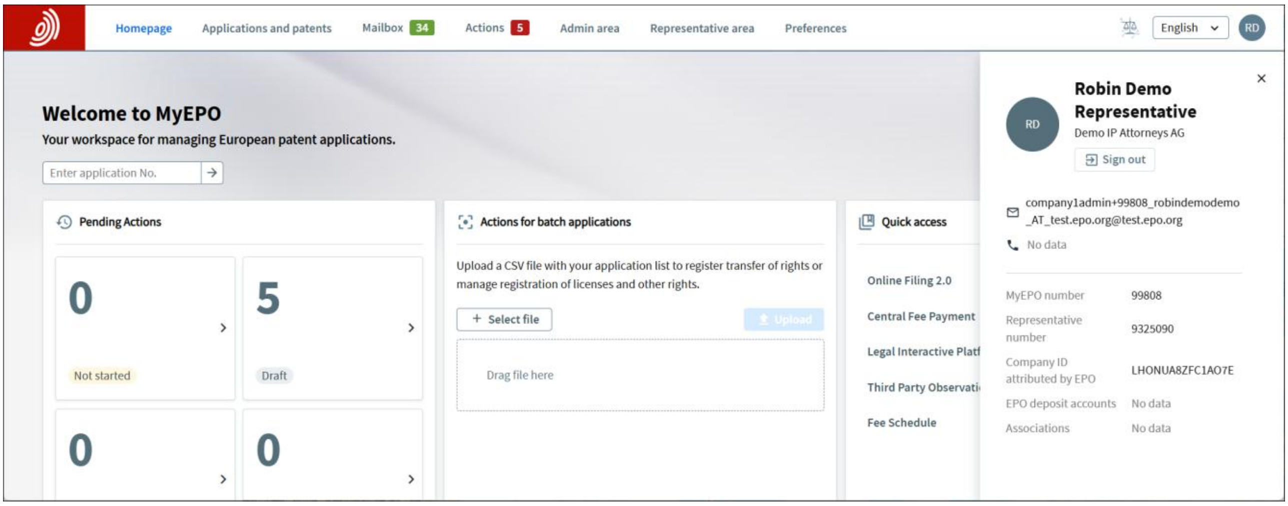
3.2 Tips

- **Same administrator for both systems**: Designate the same company administrator for both MyEPO and Online Filing 2.0 to maintain consistency.

- **Comprehensive training:** The administrator should be well-versed in all MyEPO functionality, even features you don't currently think you are using.

- **Work as an association:** Operating as an association helps avoid file ownership issues and reduces administrative burden.

- **Remind new attorneys** that they can check whether they have been removed from previous associations by clicking on their avatar (found in the top right corner of the screen). This verification ensures clean transitions between organisations.



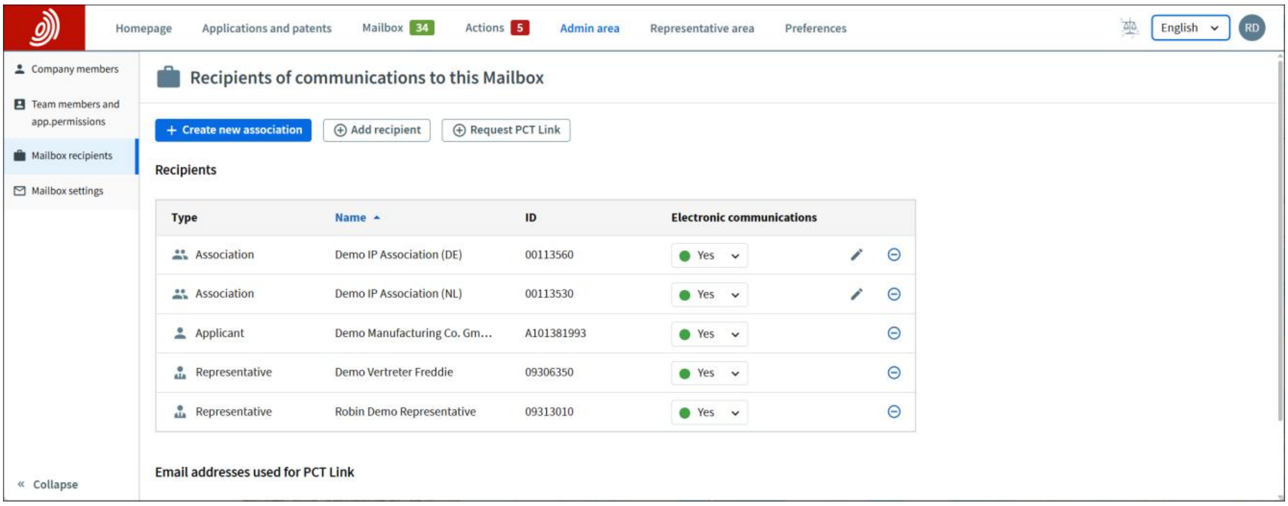
- Put a process in place to regularly check your reference numbers. A good time to do this is when EPO communications arrive in the Mailbox. If you find an incorrect reference number, you can update it individually in **Applications and patents** by selecting the application, then clicking on the pen icon next to the reference number. Update it and save it.

  Note: You can also update reference numbers in bulk using the API for large-scale corrections.

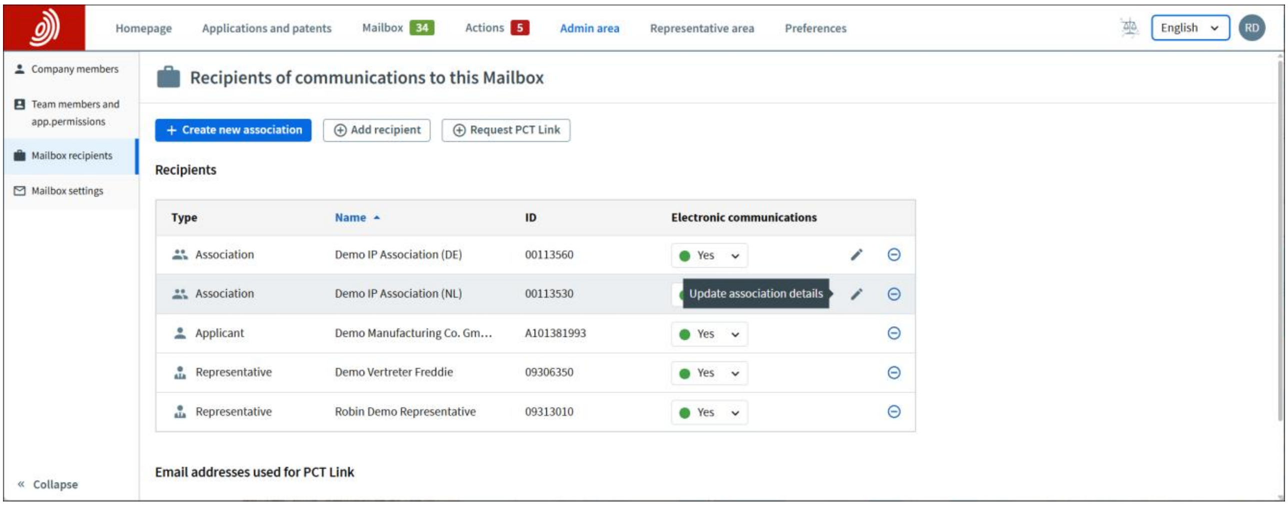
4. Creating and updating associations

Company administrators can manage associations directly through the **Admin area** of MyEPO. This section outlines the procedures for creating new associations and updating existing association details.

Under **Admin area** the administrator can go to **Mailbox recipients** and create a new association immediately.



Or in the same area to the right of the association entry, they can update general details in the case of moving office, etc.



5. Claiming refunds

To claim refunds through Central Fee Payment, employees must meet the following requirements:

- Deposit account linkage: The employee's deposit account must be linked to their EPO profile
- Fee payment rights: the administrator must grant fee payment rights (view, pay, manage)
- Portfolio access: Permission to access relevant portfolios or all file portfolios is required

When you claim a refund, make sure that you have an internal process to view which refunds have been made, i.e. save the PDF receipt to a common folder, as Central Fee Payment does not give you an overview of claimed (but not yet reimbursed) refunds.

Similarly to having multiple administrators you may want several people to have similar rights in regard to refunds (example: a new employee given these rights will not see a refund that was already available in Central Fee Payment, on joining the company, you therefore need someone who was already at the company to view or process these refunds).

When a recipient (attorney) leaves, they will take the potential refund with them and this will then only be visible to them (or someone with permissions) at their new company. They will no longer be linked to the correct deposit account companies.

Tips:

- Always update deposit account for an application when filing or taking over applications from other companies.

- Check before somebody leaves whether there are pending refunds in your system.