

# **MyEPO Portfolio**

Feature guide: Handling Mailbox communications



## Content

1.	Introduction	2
2.	Setting up your Mailbox and PCT Links	3
2.1	Manage recipients and activate the Mailbox	3
2.2	Set up PCT Links	4
2.3	Allow users from your company to access the Mailbox	5
3.	Handling incoming Mailbox communications	6
3.1	Use the Mailbox area	6
3.2	Set up email alerts	8

### 1. Introduction

You can use MyEPO Portfolio to receive electronic communications from the EPO about your EP, UP and PCT proceedings.

The **Mailbox** area of MyEPO Portfolio makes it easy for you to handle these incoming communications and download them to your IP management and docketing systems. You can also set up email alerts that let you know when new communications have arrived in your Mailbox.

In the case of European applications (EP, UP and Euro-PCT), this is available for professional representatives before the EPO, legal practitioners (Art.134(8) EPC), or self-representing applicants who have their residence or place of business in an EPC Contracting state.

For PCT applications in the international phase, if you are an international agent or selfrepresenting international applicant that has selected the EPO as international search authority (S-ISA) or international preliminary examination authority (IPEA), you can set up "PCT Links" so that communications from the EPO are also delivered to your Mailbox.

This is a company-based service, which means that communications are delivered to a company's mailbox, not to individuals within the company.

This feature guide explains how to set up and use the Mailbox.

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

## 2. Setting up your Mailbox and PCT Links

When your company has been set up for the first time in MyEPO Portfolio, it already includes a Mailbox that will be initially deactivated.

For more details on setting up a company in MyEPO Portfolio, please see the feature guide on managing user access in MyEPO Portfolio.

Before you can use the Mailbox, your company administrator can use the **Admin area** in MyEPO Portfolio to set up the Mailbox as follows.

#### 2.1 Manage recipients and activate the Mailbox

In the **Mailbox recipients tab**, as a company administrator you can request to add "recipients" for whom electronic communications can be sent to the company mailbox and whose portfolios can be accessed in MyEPO Portfolio.

A "recipient" can be a European representative, a legal practitioner, a Rule 156(11) association, or a self-representing party (applicant or opponent) who has their residence or place of business in an EPC Contracting state.

EP0 Admin area	× +				✓ - □ ×					
← → C û 🕯 my-o.epo.org/user-area/mailbox-osa/admin/recipients/										
Applications and patents Mailbox Actions Admin area Representative area Preferences										
Company members Recipients of communications to this Mailbox										
💼 Mailbox recipients	Mailbox recipients									
Mailbox settings	Mailbox settings									
	Recipients									
	Туре	Name 🔺	Electronic communications							
	Association	Demo IP Attorneys AG	● No ~	Remove						
	Applicant	Demo Manufacturing Co. GmbH	no Manufacturing Co. GmbH 🕒 No 🗸 Remove							
	Representative	Demo Representative Robin	● No ~	Remove						
	Email addresses used for PCT Link									
	Email address 🔺									
	No PCT Link requested									
*										

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

Once your request has been accepted, you can have communications addressed to the recipient sent to this Mailbox by selecting "Yes" in the Electronic communications column.

You can choose to stop receiving electronic communications for a recipient at any time or remove the recipient from your Mailbox – for example, if they no longer work for you.

In the **Mailbox settings** tab, you should also activate the Mailbox for your company. You can deactivate your Mailbox at any time.



#### 2.2 Set up PCT Links

If you are an international applicant or agent with international PCT applications for which the EPO is acting as ISA or IPEA, your company administrator can also arrange for communications from the EPO to be delivered to your Mailbox by setting up PCT Links.

In the **Mailbox recipients tab**, as a company administrator you request a PCT Link and enter the email address that was either indicated in Form PCT/RO/101 or has since been provided to the International Bureau of WIPO.

) Appl	ications and patents	Mailbox 3 Actions 7	Admin area Representa	tive area Preferences		English v RD
Company members	Recipients	of communications	to this Mailbox			
Mailbox recipients						
Mailbox settings		(+) Request PCT Link	Request PCT Link		×	
	Recipients		Q You're asking the EPO to lin	nk the email address entered below	w to	
	Туре	Name 🔶	this Mailbox. First an email will be sent f			
	Association	Demo IP Atto	address asking the recipier agree to having that email	nt to sign in to MyEPO Portfolio and address linked to this Mailbox.	d to	
	2 Applicant	Demo Manufa	This will route to this Mailb related to international (PC	ox all communications from the Ef CT) applications ("notifications") fo	PO pr	
	Representative	Demo Repres	which that email address v PCT/RO/101 or has since be Bureau of WIPO.	vas either indicated in Form een provided to the International		
	Email addresses used	d for PCT Link				
	Email address 🔶		to have the email address bel	provided above, and confirm that ow linked to this Mailbox.	I want	
	No PCT Link requested	1	Enter email address	þ		
			Re-enter email address			
				6		
				Cancel Send rec	quest	
×						

An email will then be sent from noreply@epo.org to that email address, asking the recipient to sign in to MyEPO Portfolio and agree to link the email address to this Mailbox.

You can then have all communications from the EPO for PCT applications associated with this address routed to your Mailbox by selecting "Yes" in the Electronic communications column.

You can choose to stop receiving electronic communications at any time or remove the PCT Link from your Mailbox.

#### 2.3 Allow users from your company to access the Mailbox

As a company administrator, go to the **Admin area** and use the **Company members** tab to see the list of users associated with your company, and specify which of them should have access to handle Mailbox communications.

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← → C ☆ m	y-o.epo.org/user-area/mailbox-osa/admin/users/		ie ☆	* 🕹 🖬 😩 :
	cations and patents Mailbox Actions	Admin area Representative area Preferences		English Y RD
Company members	Company members			
Mailbox recipients				
Mailbox settings	Name 🔶	Mailbox access Fee payment rights	Admin rights	
	Robin Demo Representative You	• Yes • Manage, pay and view •	Yes	
«				

## 3. Handling incoming Mailbox communications

#### 3.1 Use the Mailbox area

If your company administrator has granted you access to the company Mailbox (see section 2.3), you will see the **Mailbox** area when you sign in to MyEPO Portfolio and can view your Mailbox communications.

Applications and patents Mailbox 2 Actions 7 Admin area Representative area Preferences										
Inbox	(		Inbox							
Unread										
Recently read	3 selected Actions      Actions      Change view      Filter by      Q Search Mailbox									
Not handled			Name Download key d	ata (CSV)	Application number	Your reference	Applicant	Recipient	Status	
<ul> <li>Deleted</li> <li>My Mailbox folder 1</li> <li>My Mailbox folder 2</li> </ul>			Download conn     Com     Y     Mark as handled     regist     chan,     addr     Delete	nunication (PDF)	EP19150571.8	JL98360P.EPP	Demo IP Attorney	Demo IP Attorney		
			Communication of amended entries concerning the representative	27.10.2023	EP19150561.9	Theodor's User day	Demo Manufactur	Demo IP Attorney		
			Communication of the registration of a transfer or change of name and/or address	27.10.2023	EP19150561.9	72.50.141296	Demo Manufactur	Demo IP Attorney		
			Notification de l'inscription d'un transfert ou changement du nom et/ou de l'adresse	27.10.2023	EP18160515.5	MH for User day	Demo Representa	Robin Demo		
			Communication of amended entries concerning the representative	20.10.2023	EP21197681.6	C15651EP6/D11082EP06	Demo Manufactur	Demo IP Attorney		
			Communication of the registration of a transfer or change of name and/or address	02.10.2023	EP16001095.5	E116-tba-EP	Demo Manufactur	Demo IP Attorney		
Add folder			Invitation to indicate the claims and the subject-	24.05.2023	EP23150238.6	testseema216may	Demo Manufactur	No data		

The Mailbox area allows you to organize your communications by folders. There are standard folders (Inbox, Unread, etc), but you can also add your own folders for grouping communications.

You can search and filter Mailbox communications, and perform actions on one of more communications:

- Download information about your Mailbox communications to a CSV file that you can open in Excel or upload to your IP management or docketing systems.
- Download the files included in the communication to a ZIP file
- Mark communications as "handled", move them to a folder or delete them

When you click on a communication, you can also view and download the content. If you have been granted permission to view the portfolio of applications, you can easily access the application in the **Applications and patents** area.



You can also connect your IP management or docketing systems directly to MyEPO Portfolio using a business-to-business technical interface (API – Application Programming Interface) to automate downloading incoming Mailbox items. For more information on this feature, please see the <u>feature</u> guide on APIs for exchanging information with your IP management systems.

#### 3.2 Set up email alerts

If you are a user from a company that doesn't receive communications every day from the EPO, you may find it useful to set up email alerts that let you know when new communications have arrived in your Mailbox.

You can do this in the **Preferences** screen.



The first option ("New communications") is only available to Mailbox users.

The second and third options ("New procedural actions" and "Upcoming deadlines") are only available to MyEPO Portfolio users who have been granted access to portfolios of applications by their company administrators. The alerts for deadlines and procedural actions apply only to those currently available in the Actions screen.