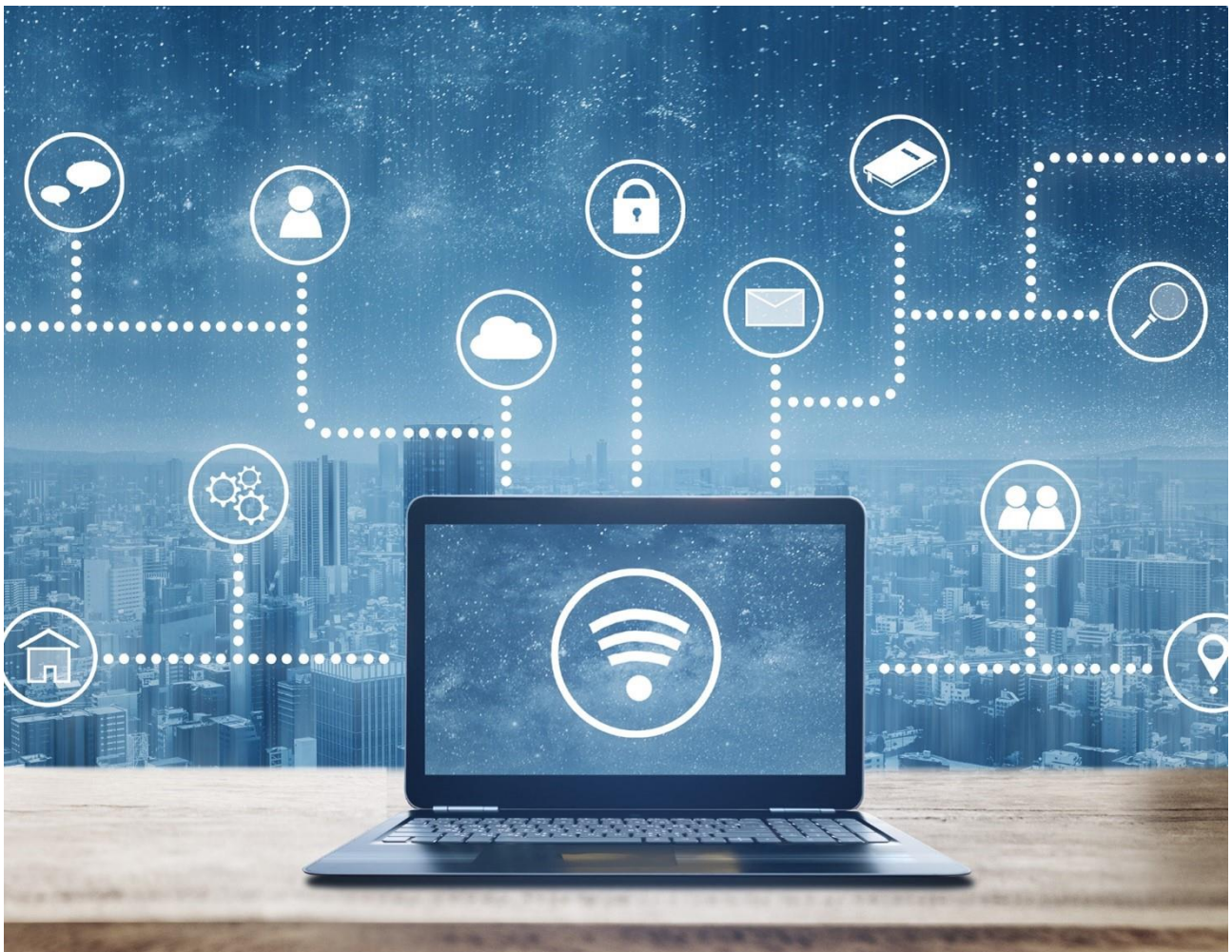


MyEPO Portfolio

Feature guide: managing representative profiles and associations



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1. Introduction

The EPO publishes on its website a [searchable database of professional representatives registered with the EPO](#) who are authorised to represent applicants in European patent grant-related proceedings.

Applicants or opponents may represent themselves and perform procedural acts during proceedings, but only if they have their residence or principal place of business in an EPC contracting state.

If their residence or principal place of business isn't in an EPC contracting state, they are obliged to be represented by a professional representative and act through them in all proceedings established by the EPC other than in filing a European patent application.

And even if their place of resident or business is in an EPC contracting state, they may choose to appoint or consult a professional representative.

The **representative area** in MyEPO Portfolio allows registered professional representatives to manage the personal and contact information that is published about them on the EPO website.

[The EPO will launch a new and improved searchable database on its website on 3 February 2025.](#) This database will list each registered professional representative with a standardised set of information. Any preferences expressed by representatives as to whether they should be included in the database or as to whether the business address they provided should be published will cease to apply as of 3 February 2025. The preference expressed for the publication of telecommunication details (email address, telephone number and website URL) will remain valid.

As a professional representative, you are advised to check the data we have on record before February 2025.

You can do this in the representative area of MyEPO Portfolio. You can make changes to telecommunication details directly in MyEPO Portfolio. For changes to name or postal address you will need to make a request to the EPO. For technical reasons, please do not update your telecommunication details on the same day as making a request to have your name or postal address updated by the EPO.

You can also delegate this to members of your IP support team.

You won't have access to your representative area until you have been entered on the list of professional representatives before the EPO. You can use MyEPO Portfolio to request entry on the list.

You can also request re-entry if you have been deleted from the list.

Company administrators can also use the **Applications and patents** area of MyEPO Portfolio to add and remove members of an association ([Rule 152\(11\) EPC](#)).

This feature guide explains how to use MyEPO Portfolio to manage representative profiles and associations, and you can [read about the legal framework for professional representation](#) on our website.

We have also published some [frequently asked questions \(FAQs\)](#), and you can always get in touch with us at epo.org/support or your key account manager if you're still not sure about something.

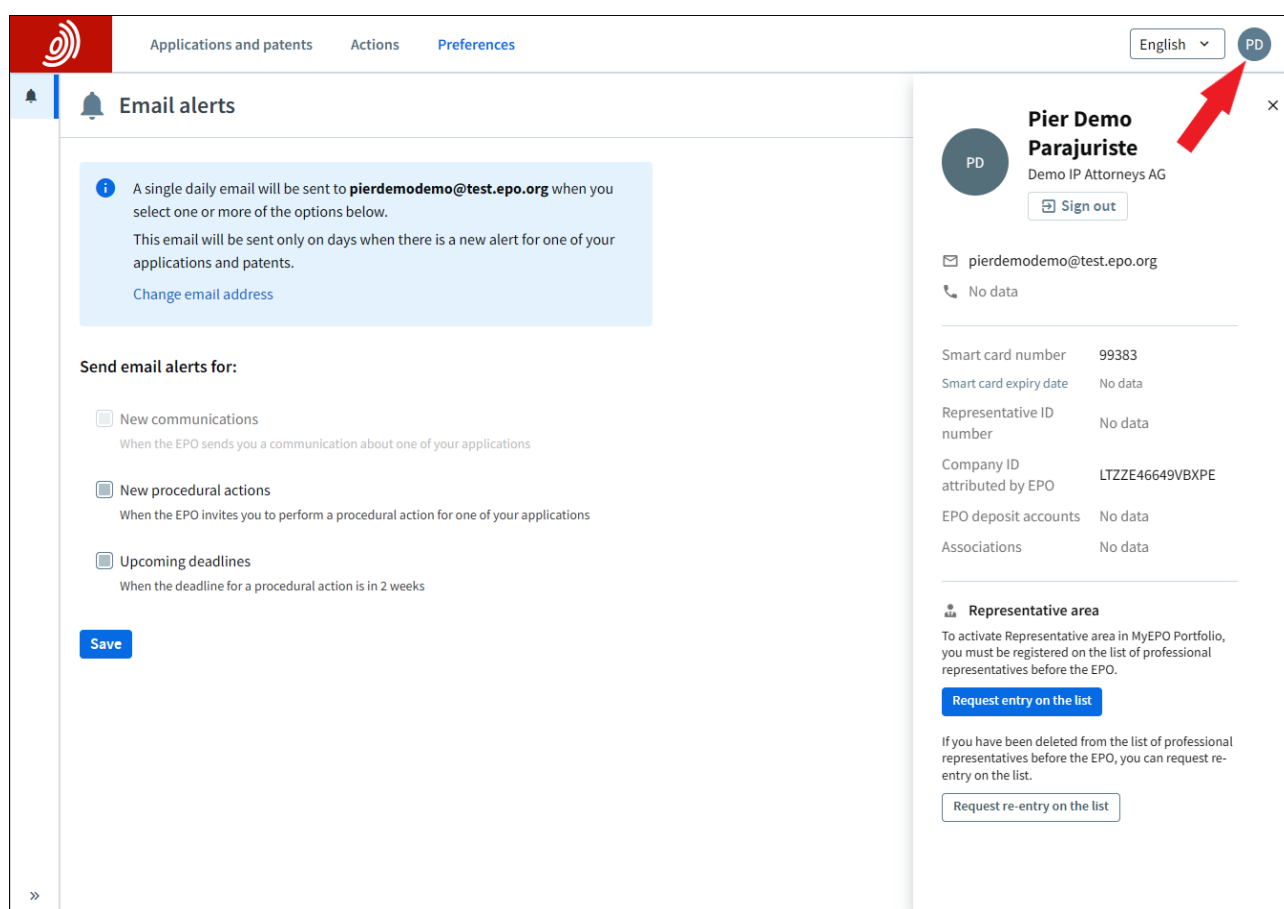
2. How to be entered on the list of professional representatives

You can use MyEPO Portfolio to file your request for entry on the list of professional representatives registered with the EPO. This authorises you to represent parties in European patent grant-related proceedings under Article 134 EPC.

If your entry on the list has been deleted, you can also request re-entry on the list.

In both cases, first make sure you have access to MyEPO Portfolio using your EPO account with two-factor authentication. If you are a new user of MyEPO Portfolio, follow the instructions on the [Get access](#) page of our website.

To request entry or re-entry on the list, sign in to MyEPO Portfolio and open your user profile by selecting the user icon in the top right-hand corner:



The screenshot displays the MyEPO Portfolio user profile page. The top navigation bar includes 'Applications and patents', 'Actions', and 'Preferences'. The user's name is 'Pier Demo Parajuriste' and the email is 'pierdemodemo@test.epo.org'. The page is divided into two main sections: 'Email alerts' on the left and 'User profile' on the right. The 'Email alerts' section includes a notification about daily emails and options to send alerts for new communications, procedural actions, and upcoming deadlines. The 'User profile' section shows account details such as smart card number, expiry date, representative ID, company ID, and deposit accounts. A red arrow points to the user icon 'PD' in the top right corner.

Select the “request entry” or “request re-entry” option and a screen appears that will guide your through providing the information needed to submit your request.

[The EPO will launch a new and improved searchable database on its website on 3 February 2025.](#) This database will list each registered professional representative with a standardised set of information. Any preferences expressed by representatives as to whether they should be included in the database or as to whether the business address they provided should be published will cease to apply as of 3 February 2025. The preference expressed for the publication of telecommunication details (email address, telephone number and website URL) will remain valid.

As a professional representative, you are advised to check the data we have on record before February 2025. For more information see the [FAQ](#).

The screenshot shows the 'Representative profile' page in the MyEPO Portfolio. The main heading is 'Request for entry on the list of professional representatives before the European Patent Office'. Below this is a 'Data protection statement' and a progress bar with six steps: Section 1, Section 2, Section 3, Section 4, Section 5, and Review and submit. Section 1 is currently active and contains the following text: 'Section 1: Request for entry on the list of professional representatives before the European Patent Office (EPO)', 'I request entry on the list of professional representatives under Article 134 EPC.', and 'I fulfil the conditions prescribed by Article 134(2) EPC.'. Below the text are two input fields: 'First name' with the placeholder 'Enter first name' and 'Last name' with the placeholder 'Enter last name'.

Provide the information indicated in each section of the request and finally review and submit your request.

If you aren't sure about some of the information requested, please have a look at the FAQs on entry to the list of professional representatives. If that doesn't help, you can always send an enquiry to our support team via our contact form.

Your request will be handled by the EPO. If there is a mistake in your request, you will be notified by post and can correct the mistake in MyEPO Portfolio.

Once your request has been processed successfully you will be notified. The next time you sign in to MyEPO Portfolio as a registered professional representative, you will see the option to access your personal representative area through the main menu of MyEPO Portfolio.

The screenshot shows the 'Representative profile of Robin Demo Representative' page in the MyEPO system. The page includes a navigation bar at the top with links for 'Applications and patents', 'Mailbox 8', 'Actions', 'Admin area', 'Representative area', and 'Preferences'. The user's name 'Robin Demo Repre...' is visible in the top left, and the language is set to 'English' with a user ID 'RD' in the top right. The main content area displays the following profile information:

Representative ID number	9313000	
Date of entry on the list of representatives before the EPO	22.03.2024	
Name	Representative, Robin Demo	
Nationality	United Kingdom	
Preferred language	English	
Address	Demo IP Attorneys AG Berlinplatz 52 80340 München Germany	
Phone number	49 89 23992	
Fax number	Not used for correspondence with the EPO	
	49 89 23993	

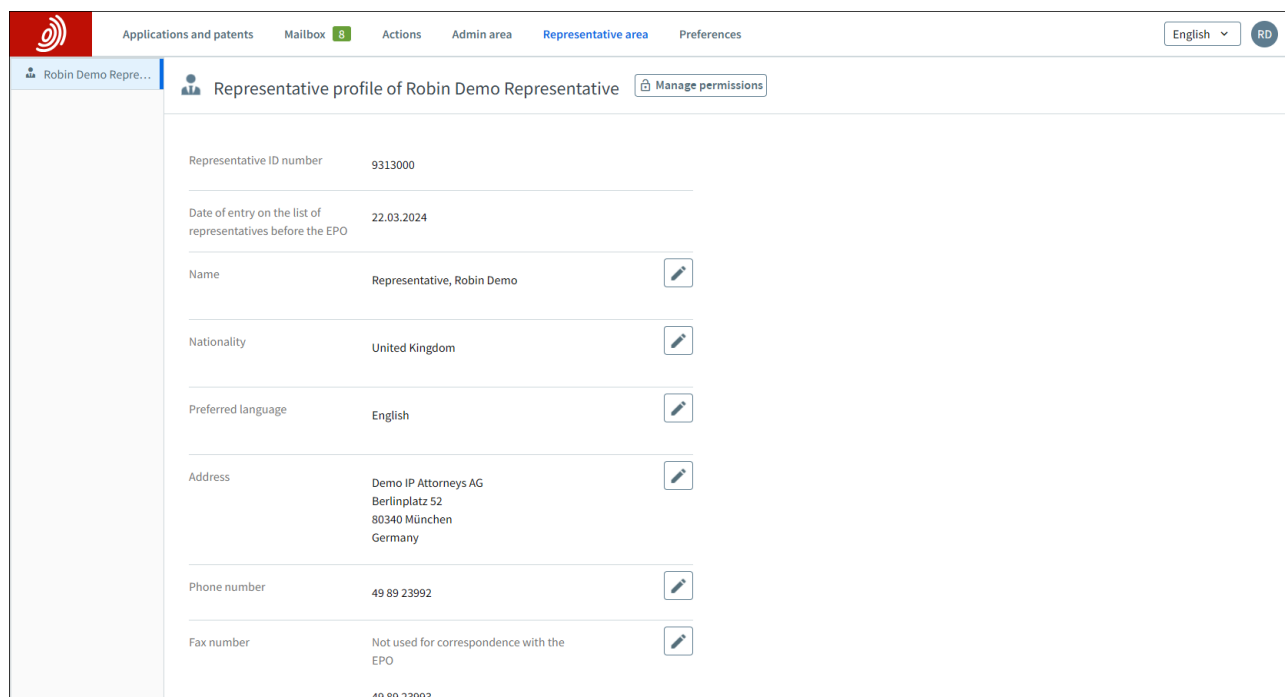
Once you have been registered on the list you can also delegate access to your representative area to other members of your company, by selecting the **Manage permissions** option. They will be able to edit information about your profile on your behalf.

3. Managing representative profiles







In your MyEPO Portfolio “representative area” you can request changes to your representative profile and can request to be deleted from the list of professional representatives before the EPO.

3.1 How to access the representative area

As a registered professional representative, you can access your representative area through the main menu of MyEPO Portfolio.



The screenshot shows the 'Representative profile of Robin Demo Representative' page in the MyEPO Portfolio. The page has a navigation bar at the top with 'Applications and patents', 'Mailbox 8', 'Actions', 'Admin area', 'Representative area', and 'Preferences'. The 'Representative area' is selected. The profile details are as follows:

Representative ID number	9313000	
Date of entry on the list of representatives before the EPO	22.03.2024	
Name	Representative, Robin Demo	
Nationality	United Kingdom	
Preferred language	English	
Address	Demo IP Attorneys AG Berlinplatz 52 80340 München Germany	
Phone number	49 89 23992	
Fax number	Not used for correspondence with the EPO	
	49 89 23993	

You can also delegate access to other members of your company by selecting the **Manage permissions** option. They will be able to edit information about your profile on your behalf.

3.2 Request changes to your representative profile

The EPO will launch a new and improved searchable database on its website on 3 February 2025. This database will list each registered professional representative with a standardised set of information. Any preferences expressed by representatives as to whether they should be included in the database or as to whether the business address they provided should be published will cease to apply as of 3 February 2025. The preference expressed for the publication of telecommunication details (email address, telephone number and website URL) will remain valid. As a professional representative, you are advised to check the data we have on record before February 2025. For more information see the [FAQ](#).

Select any of the edit symbols on the screen to change your details. Follow the instructions to change the information and upload any supporting documents if requested.

At the bottom of the screen, indicate your preference for when the change should take effect, which can be as soon as possible or, in some cases, on a specific future date.

Applications and patents Mailbox 8 Actions Admin area Representative area Preferences English RD

Robin Demo Repre...

Publication of phone number Yes

Publication of fax number Yes

Publication of email address Yes

Publication of website URL Yes

Further information for internal purposes

Email address for receipt of personalised communications (not a shared address such as info@xxx.org) (optional):

epi student number (optional)

Date of change

as soon as possible

or

with effect from:

When you are ready, select **Request changes** to proceed. After submission, you have the option to download a copy of your request.

In some cases, the change requested will take place automatically. For changes to your name, nationality and/or address, the request will first need to be approved by the EPO.

A message will appear at the top of the page informing you that your request has been submitted and the EPO is processing it. Requested changes will appear highlighted in colour on your profile screen until they have been processed.

A confirmation letter will be sent to your Mailbox or to your registered postal address.

Please note: the preferred date of change cannot be guaranteed by the EPO, so the actual date may be different, for example due to EPO holidays.

3.3 Request deletion from the list of professional representatives

You can request to be deleted from the list of professional representatives before the EPO, by scrolling to the bottom of the screen and selecting **Request deletion** and filling in the form.

You may indicate new contact details, and if your Mailbox is still active a confirmation of your deletion will be sent to the Mailbox.

The screenshot shows the 'Representative profile' page in the MyEPO system. At the top, there is a navigation bar with 'Applications and patents', 'Mailbox 647', 'Actions 294', 'Admin area', 'Representative area', and 'Preferences'. A language dropdown is set to 'English' and a user icon 'TT' is visible. The main heading is 'Representative profile' with a 'Manage permissions' button. The content area is titled 'Request for deletion from the list of professional representatives before the European Patent Office'. The text reads: 'I request the deletion of my entry from the list of professional representatives under Rule 154(1) EPC. I understand that, in accordance with Article 134a(2) EPC, my membership of the Institute of Professional Representatives before the European Patent Office (epi) will also cease on the date of deletion indicated below. I am also aware that I can request re-entry on the list of professional representatives under Rule 154(3) EPC.' Below this, there are links for 'Article 134a(2) EPC | Rule 154(3) EPC'. The 'Date of deletion' section has two radio buttons: 'as soon as possible' (selected) and 'with effect from:'. The 'with effect from' option has a date input field with a calendar icon and the placeholder 'dd.mm.yyyy'. At the bottom, there is an 'Alternative contact details (optional)' section with a text area for providing an address and company/organisation details.

A message will appear at the top of the page informing you that your request has been submitted and the EPO is processing it. After submission, you have the option to download a copy of your request if you wish.

Once your request has been approved by the EPO, you will be deleted from the list and no longer have access to your representative area.

3.4 Handle deficiencies in representative area requests

Sometimes the EPO identifies an issue or deficiency with your change or deletion request.

When this happens, a message will appear at the top of your representative area profile, and a pending representative area action will appear in the **Actions** area.

You can select the option to remedy the deficiency or choose to withdraw your request.

As always, all communications related to your request will be sent to your Mailbox or registered postal addresses.

4. Managing associations

Company administrators can use MyEPO Portfolio to add and remove members of an association (Rule 152(11) EPC) provided the association has been added as a recipient in the Admin area of MyEPO Portfolio.

As a company administrator, you go to the **Applications and patents** area from the main menu, select the association in question and select the **Members** option.

The screenshot displays the MyEPO Portfolio interface. At the top, there is a navigation bar with the following items: 'Applications and patents' (active), 'Mailbox 10', 'Actions 3', 'Admin area', 'Representative area', 'Preferences', a language dropdown set to 'English', and a user profile icon 'RD'. Below the navigation bar, there is a search field 'Enter application No.' with a search icon. The main content area is titled 'Demo IP Attorneys AG' and features a sidebar menu with options: 'Demo IP Attorneys AG' (selected), 'Members', 'Permissions', 'Mandataire Matiese Demo', and 'Representative-Vertreter'. The 'Members' section is active, showing a table of 'Association members' with a '+ Add member' button. The table has three columns: 'Name', 'Company', and 'Representative number'. The data rows are as follows:

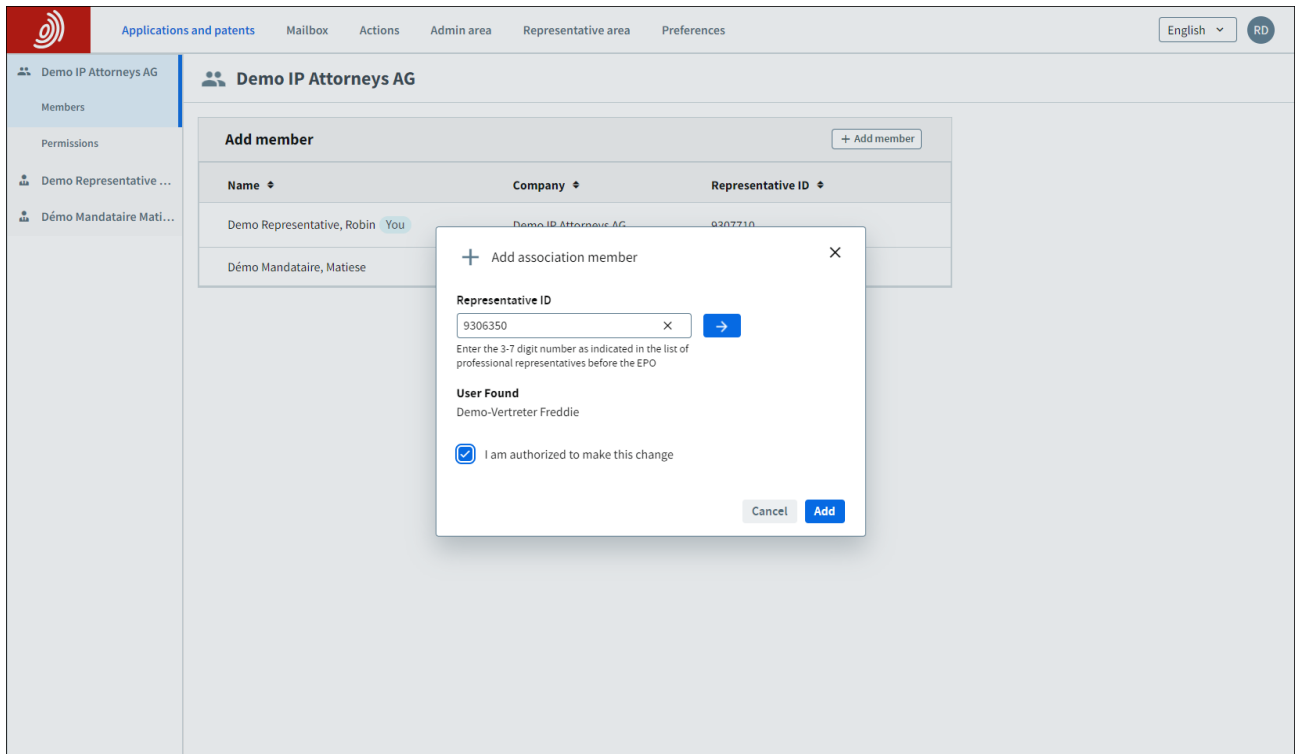
Name	Company	Representative number
Representative-Vertreter, Robin Demo You	Demo IP Attorneys AG	9313000
Y., Yvonne	KAM GmbH	80880

At the bottom left of the interface, there is a button labeled 'Upload application list'.

4.1 Add a member to an association

Select the **Add member** button and enter the Representative number of the person you wish to add to the association. This can be any representative, whether or not they are a member of your MyEPO company. The name of the representative will be shown after you have entered the ID.

Before proceeding with the request, you have to confirm that you are authorised by both an existing association member as well as the person concerned.



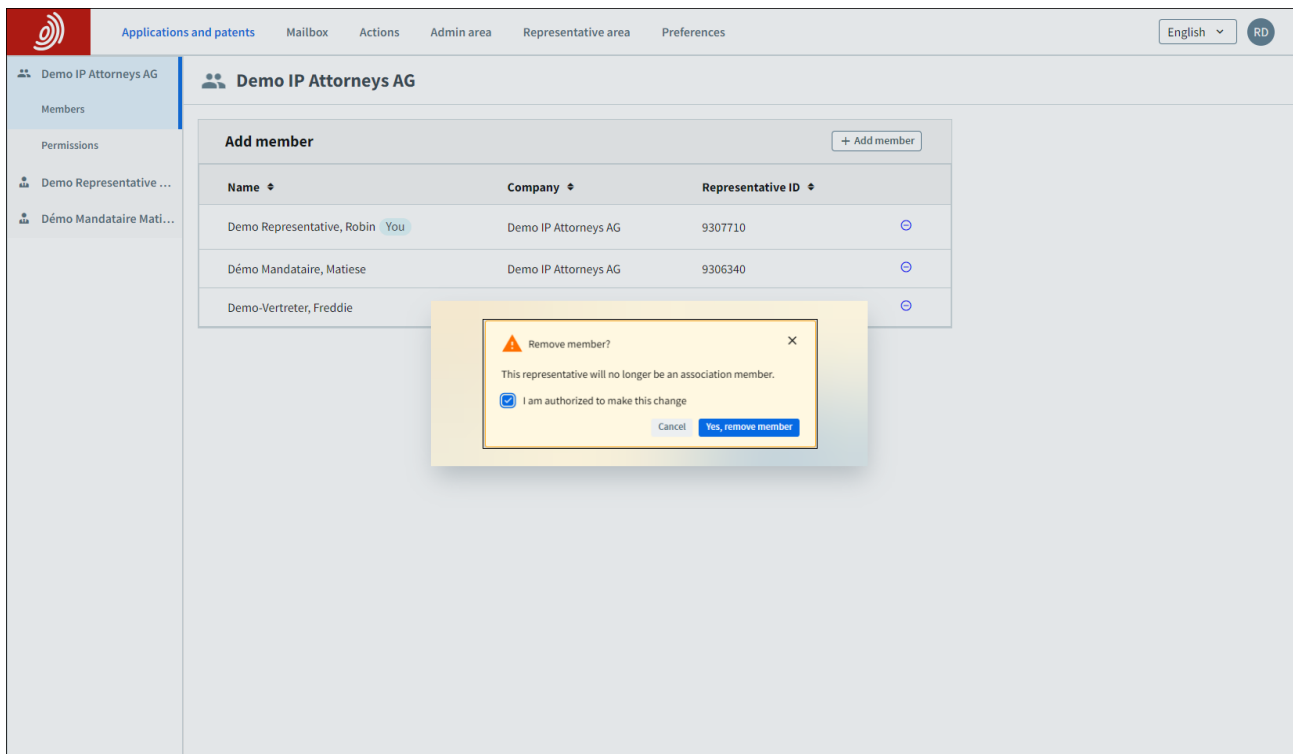
If you add or remove members of an association, a communication will be sent to your Mailbox (or postal address of the association if the association is not receiving communications electronically via the Mailbox) listing all additions and removals that took place that day.

The change takes effect immediately.

4.2 Remove a member from an association

Select the **deletion symbol** next to the name of the member that you wish to remove from the association. Please note: the deletion symbol will not appear if the association only has two members, since an association cannot have less than two members.

Before proceeding with the request, you have to confirm that you are authorised by both a remaining member of the association as well as the person concerned. In case you are unable to obtain such authorisation, please contact us at epo.org/support.



The screenshot displays the MyEPO interface for managing an association named "Demo IP Attorneys AG". The main content area shows a table titled "Add member" with columns for Name, Company, and Representative ID. The table lists three members: "Demo Representative, Robin You", "D mo Mandataire, Matiese", and "Demo-Vertreter, Freddie". Each member has a small circular icon to its right, which is the deletion symbol. A confirmation modal is open in the foreground, asking "Remove member?" and stating "This representative will no longer be an association member." The modal includes a checked checkbox for "I am authorized to make this change" and buttons for "Cancel" and "Yes, remove member".

Name	Company	Representative ID
Demo Representative, Robin You	Demo IP Attorneys AG	9307710
D�mo Mandataire, Matiese	Demo IP Attorneys AG	9306340
Demo-Vertreter, Freddie		

If you add or remove members of an association, a communication will be sent to your Mailbox (or postal address of the association if the association is not receiving communications electronically via the Mailbox) listing all additions and removals that took place that day.

The change takes effect immediately.