MyEPO services

Feature guide: your EPO account and two-factor authentication

Content

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 authentication 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) and our legacy Online Filing software (eOLF), 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-factor authentication or an EPO smart card.

Two-factor authentication, or "2FA", is where you use the default authentication "factor" – a combination of email address and password – plus one of the following other methods:

- Okta Verify. This is an app on your smartphone that receives notifications in the form of a **Yes** or **No**. It can also generate six-digit, one-time authentication codes.
- Google Authenticator. This is an app on your smartphone that generates six-digit, one-time authentication codes.
- Text message (SMS). This sends a six-digit, one-time authentication code via text message to your mobile phone.
- Email. This sends a six-digit, one-time authentication code or a direct link to the email address you have indicated.

These other methods are the second factor in the authentication process. We strongly advise you to set up two or more of these other methods, to avoid difficulties if you can't use one of them – for example if you lose your phone.

This feature guide explains:

- how to create an EPO account and set up 2FA if you are a new user without a smart card (see section 2)
- how to start using 2FA 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 2FA today.

To guide you further, we have also published some frequently asked questions (FAQs):

- FAQs on EPO account
- FAQs on phasing out the use of smart cards in 2024
- FAQs on smart cards

You can always get in touch with support@epo.org or your key account manager if you're still not sure about something.

2.   Creating an EPO account if you are a new user (without a smart card)

### 2.1   Step 1 – create an EPO account with two-factor authentication

Go to the **Create an EPO account** page.

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 confirm that the address is indeed accessible and to set a password.
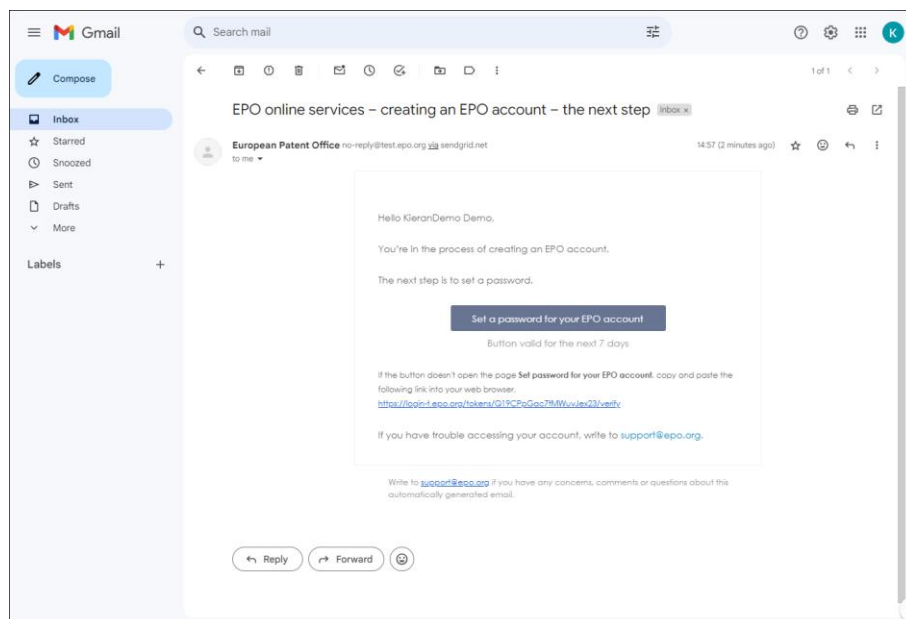
Once the password has been set, select the second-factor authentication methods you wish to use. You can choose Okta Verify, Google Authenticator and/or text message (SMS) (the three most secure options) or authentication by email.
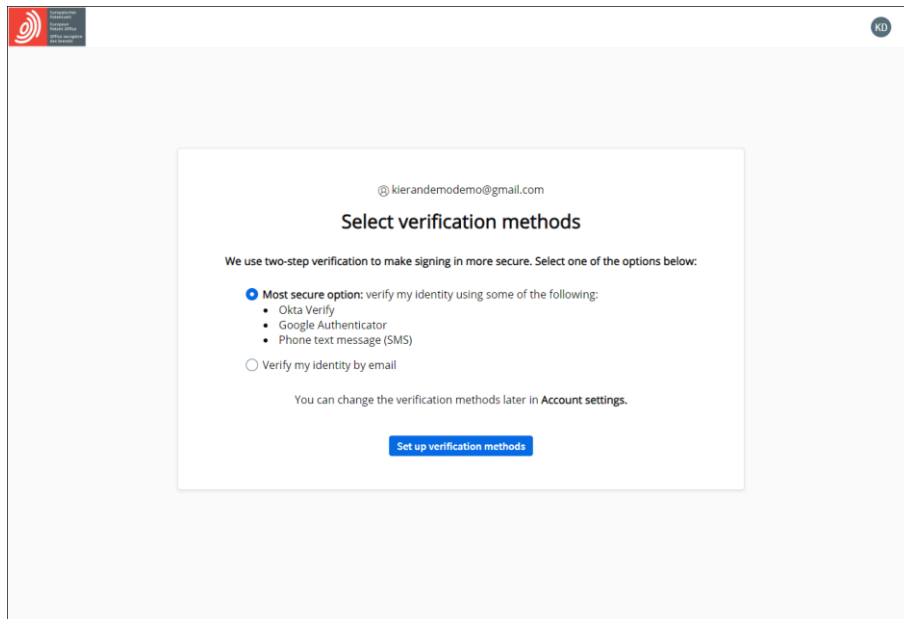
We strongly advise you to set up two or more second-factor authentication methods, to avoid difficulties if you can't use your preferred one – for example if you lose your phone.
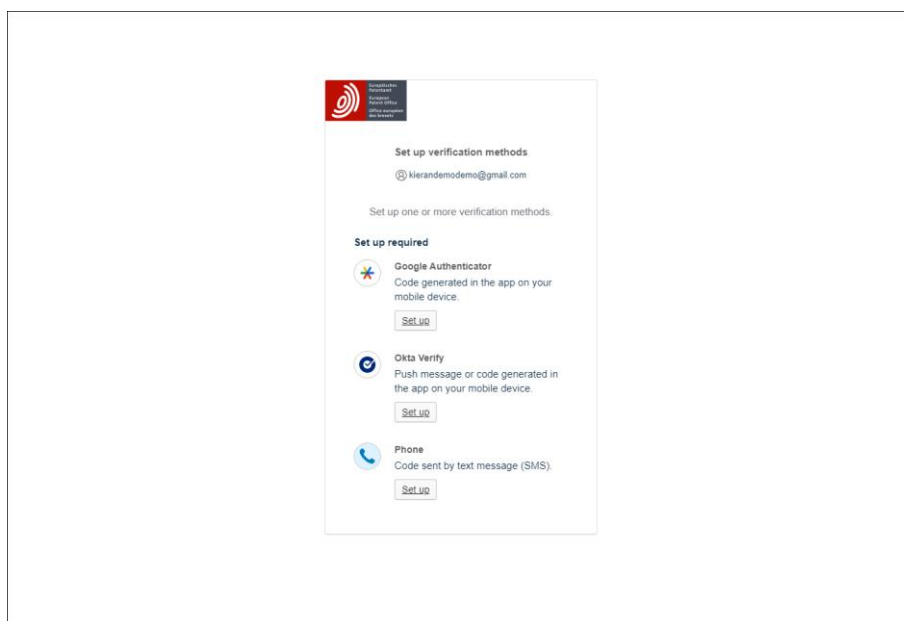
You will then see confirmation that your EPO account has been created.

However, before you sign in to MyEPO services (MyEPO Portfolio, Online Filing 2.0 and Central Fee Payment) or our legacy Online Filing software (eOLF), first select **Complete set-up in MyEPO Portfolio**. You can then choose the company you wish to link to your EPO account.
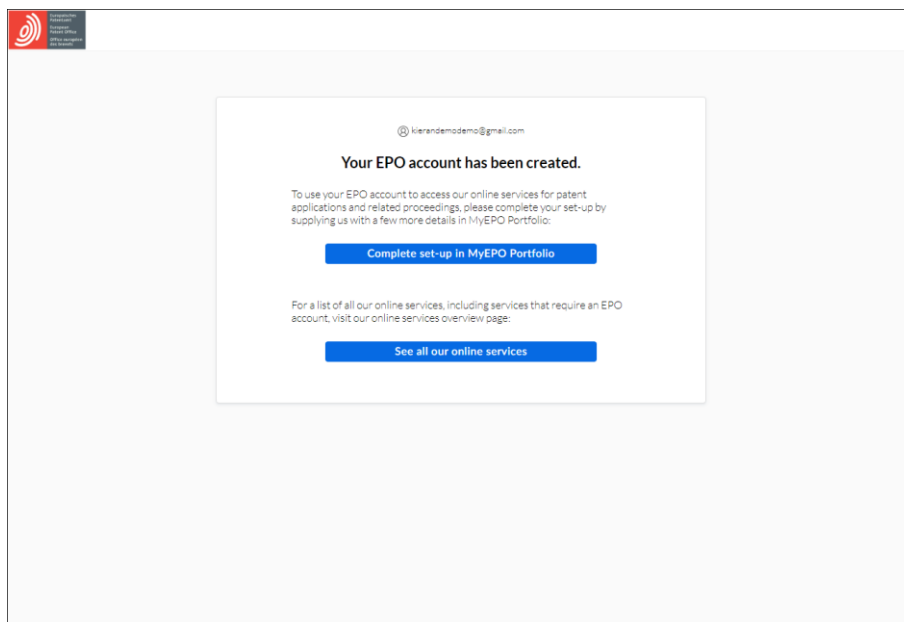
2.2   Step 2 – complete your account set-up in MyEPO Portfolio

Before you can use MyEPO services, your EPO account must first be linked to a MyEPO Portfolio "company", and your company administrator must also give you access in MyEPO Portfolio.

A company in MyEPO Portfolio is a group of users that share a mailbox and can work together on portfolios of applications.

MyEPO Portfolio allows you to set up companies that reflect your ways of working and your user groups. Some large companies choose to set up multiple MyEPO Portfolio companies that reflect their organisational structures. Others keep it simple and use just one company.

You can choose the name you give to a new MyEPO Portfolio company.

For example, it could be the legal entity name of your company or reflect a geographic location or business area.

The names of your MyEPO Portfolio companies do not have a legal meaning under the European Patent Convention or PCT, nor are they shown on any official documents.

If you are applying for a patent as a private person, and not on behalf of a company or through a professional representative, you still need to set up a MyEPO Portfolio company. You will be the administrator for this company.
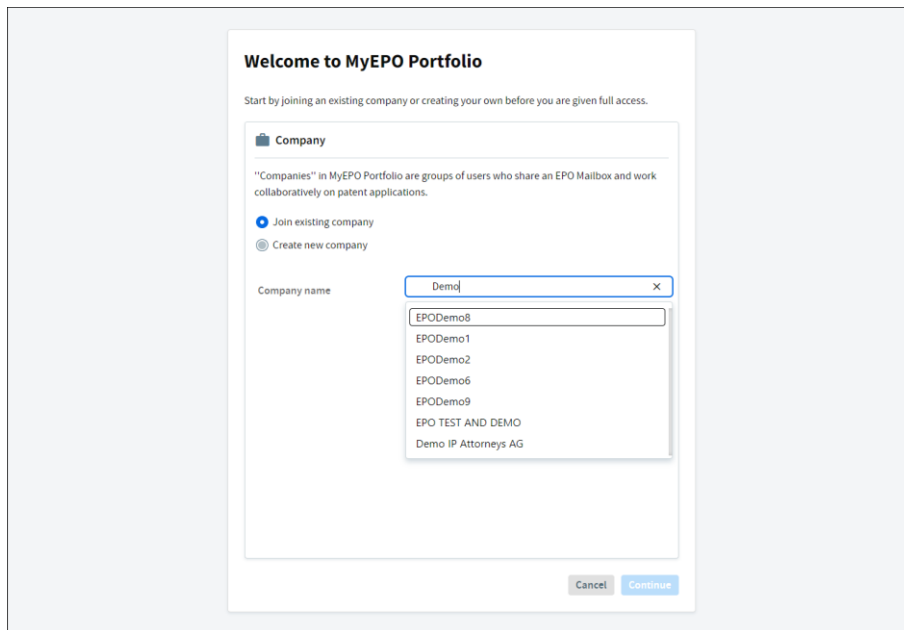
Your personal EPO account can be linked to only one MyEPO Portfolio company at any time.

Linking to a company for the first time

If you sign in to MyEPO Portfolio, and you are not yet linked to a company, you can choose to create a new company or join an existing one.
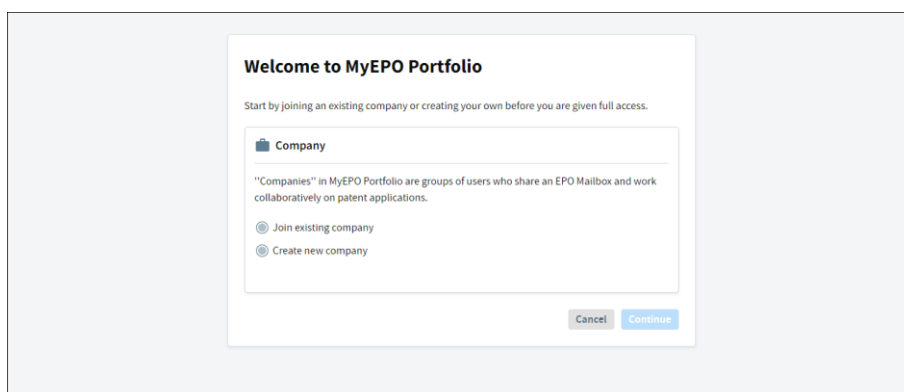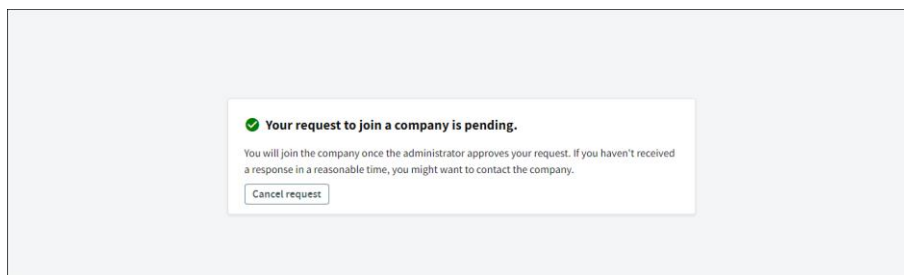
If you choose to join an existing company, enter the company name to search for. If there are several companies with that name, you will also see the company addresses. If you're still not sure which company to select, contact your MyEPO services company administrator.
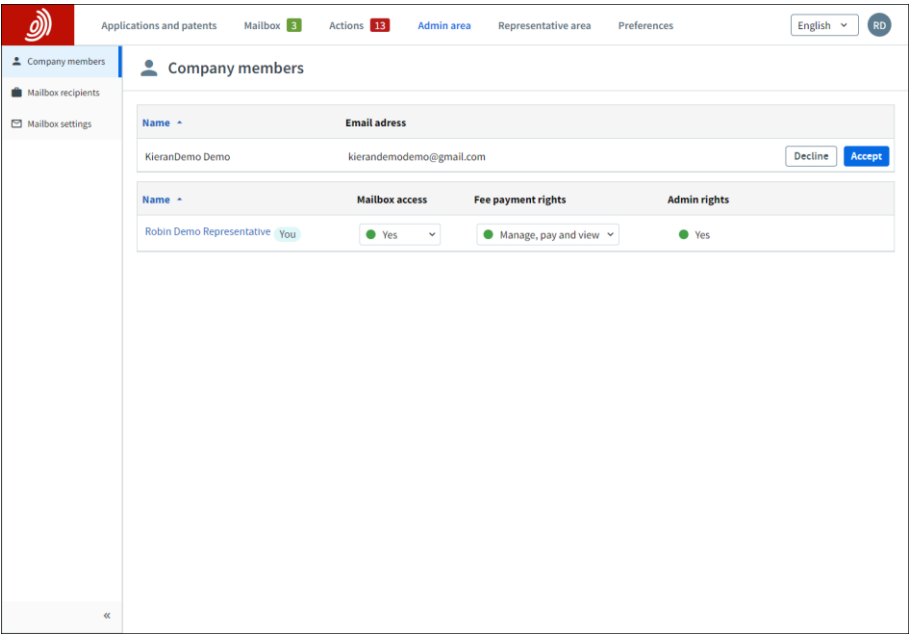

After selecting a company, you will see a message confirming that your request is pending approval by your company administrator.

Actions for your company administrator

Your company administrator can approve your request in the **Company members** section of the **Admin area**.

You will appear in the list of company members as soon as your request is approved.
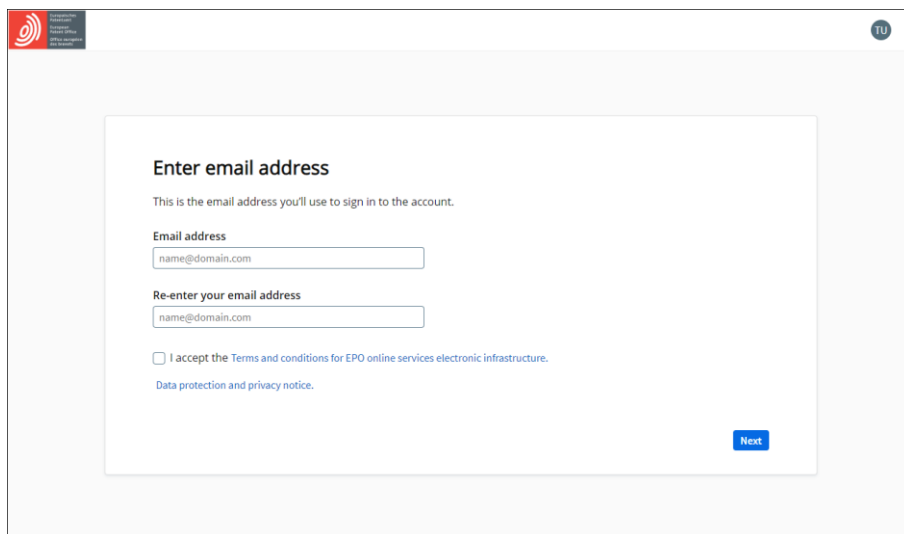
Your company administrator can then grant you access to work on your company's filings, Mailbox communications, fee payments and application portfolios as needed. For more details, see the feature guide on managing user access in MyEPO Portfolio and the Online Filing 2.0 user guide.

3.   Enabling two-factor authentication if you are an EPO smart card user

If you are an EPO smart card user, you will no longer be able to use smart cards from the end of 2024. We strongly advise you to enable two-factor authentication (2FA) today. For more information, please see our FAQs on phasing out the use of smart cards in 2024.
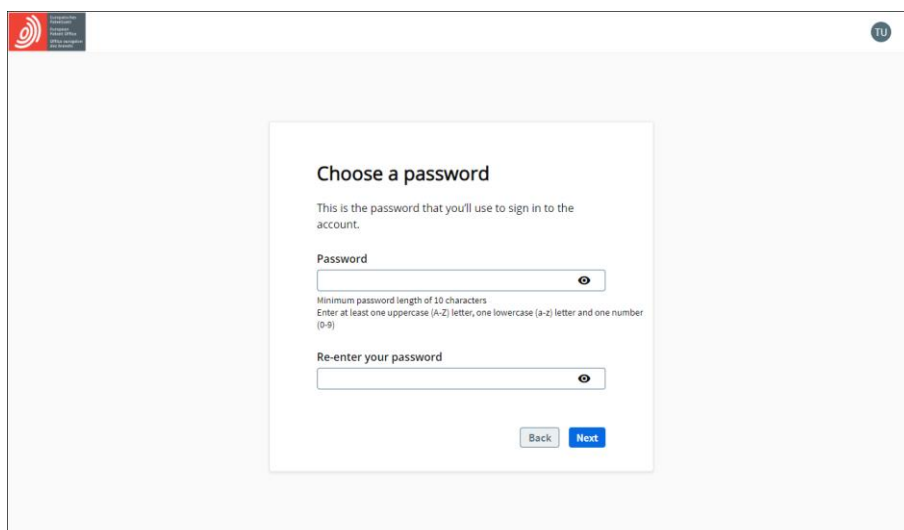
To enable 2FA, first sign in here using your EPO smart card and PIN.

After signing in, enter the email address that you will use to sign in to your account. Accept the terms and conditions for EPO online services electronic infrastructure to continue.


Next, set your password.

Once you have set your password, select the second-factor authentication methods you wish to use. You can choose Okta Verify, Google Authenticator and/or text message (SMS) (the three most secure options) or authentication by email.
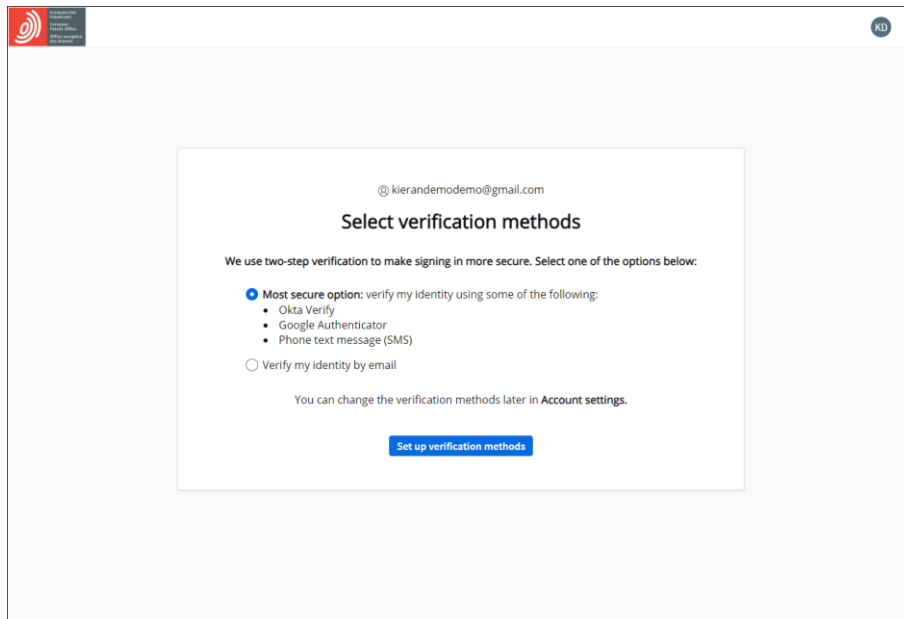
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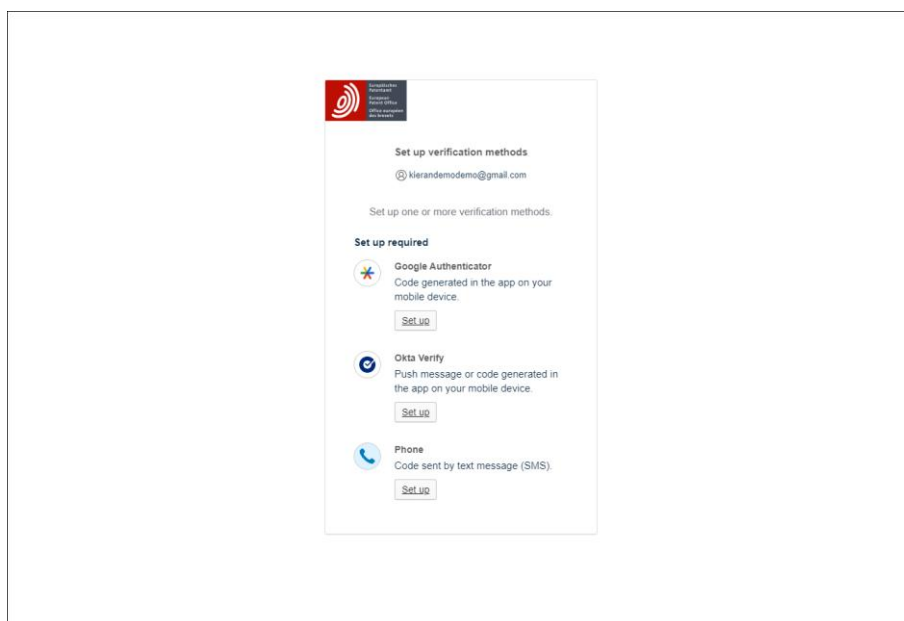
You will then see confirmation that two-factor authentication has been enabled for your account.
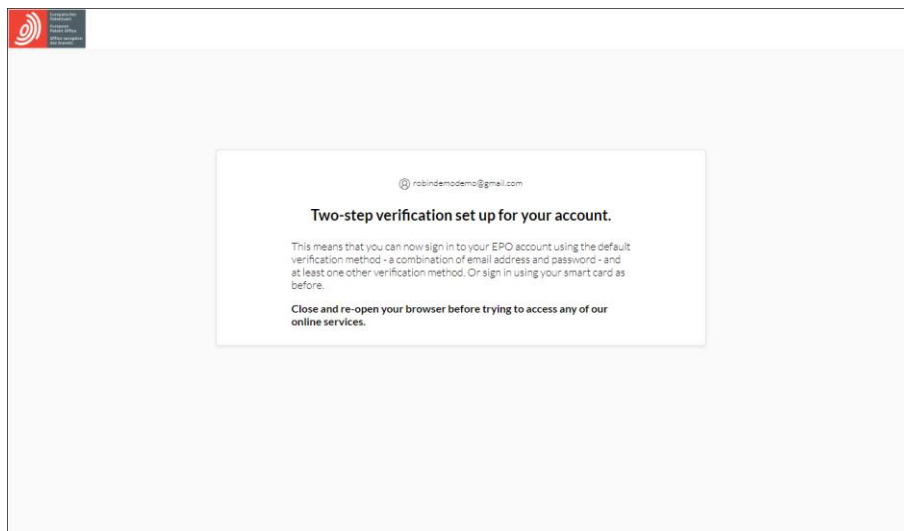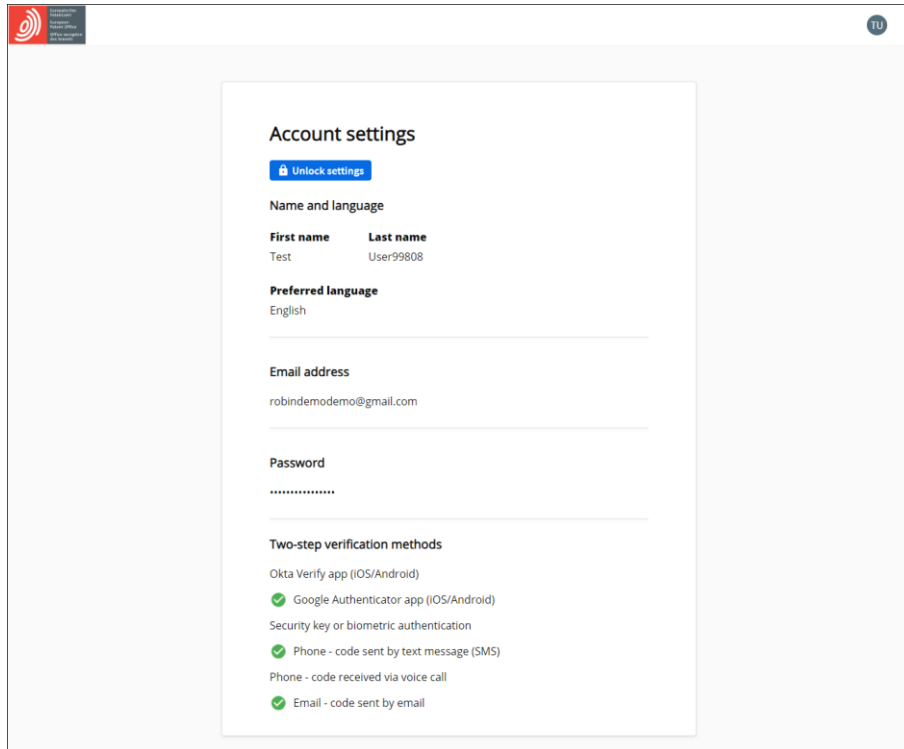

You can now use your smart card or your email address and password plus a second-factor authentication method to sign in to MyEPO services (MyEPO Portfolio, Online Filing 2.0, Central Fee Payment) and our legacy Online Filing software (eOLF).

4.   Changing your EPO account settings

You can change your EPO account settings such as first name, last name, preferred language, email address and second-factor authentication methods.

To do this, sign in to the **Account settings** page.

After selecting **Unlock settings**, and entering a one-time authentication code, you will be able to change your account settings.