

# MyEPO services

Feature guide: your EPO account and two-factor authentication



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## 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 using your EPO account with 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, UP and PCT information. So you will need to sign in using your EPO account with two-factor authentication.

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.
- Phone. This sends a six-digit, one-time authentication code via text message (SMS) or voice call to your 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 (see section 2)
- how to change your EPO account settings (see section 3)

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](#)

You can always contact us at [epo.org/support](https://epo.org/support) or your key account manager if you're still not sure about something.

## 2. Creating an EPO account if you are a new user

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

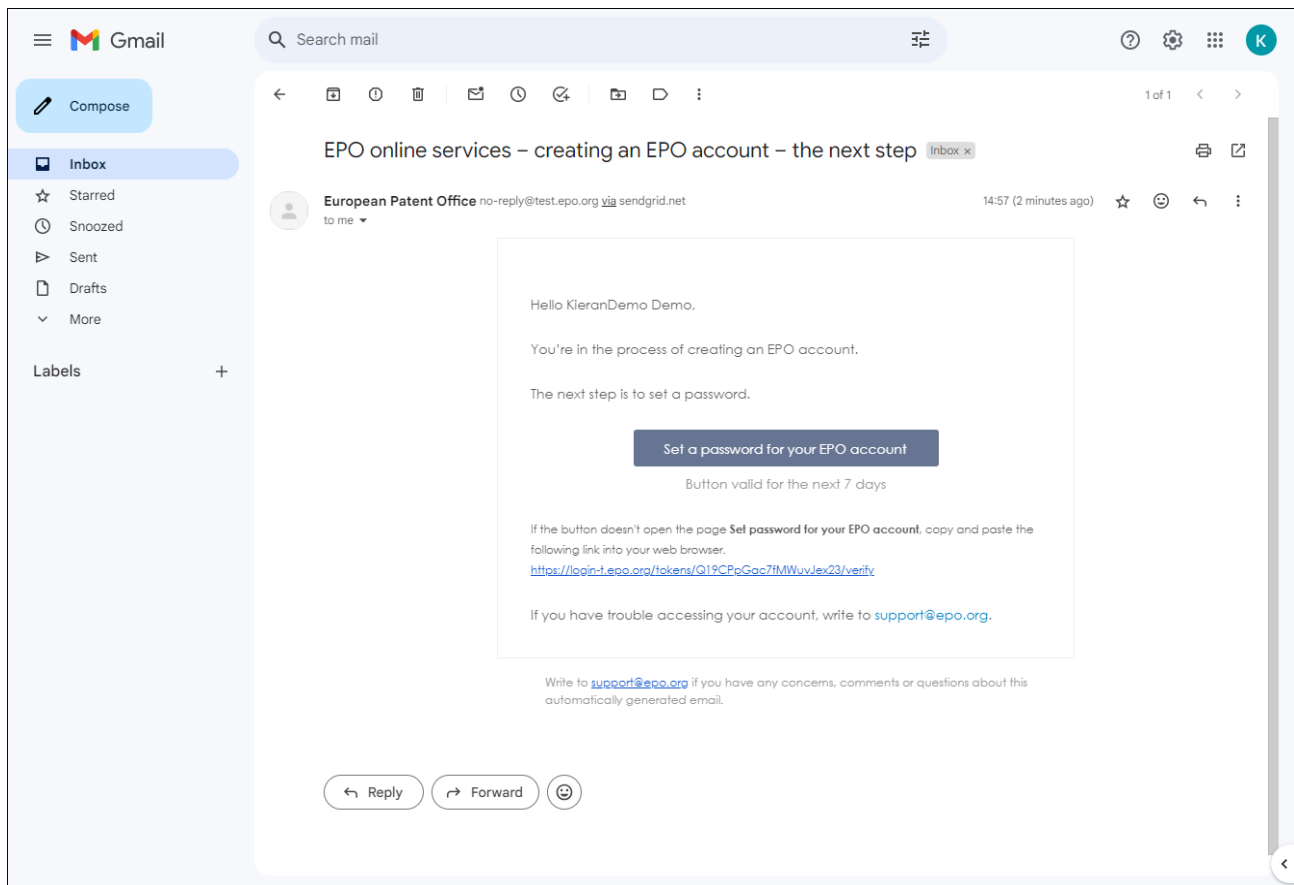
Go to the [Create an EPO account](#) page.

Enter your first name, last name, and email address, and accept the terms and conditions for EPO online services electronic infrastructure.

An individual or corporate email address can be used. However, an email address can only be linked to one EPO account.

*Note: it is important that you have access to this email address. If you change company, please always update the email associated with your EPO account (see section 3 on account settings).*

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 phone (the three most secure options) or authentication by email.

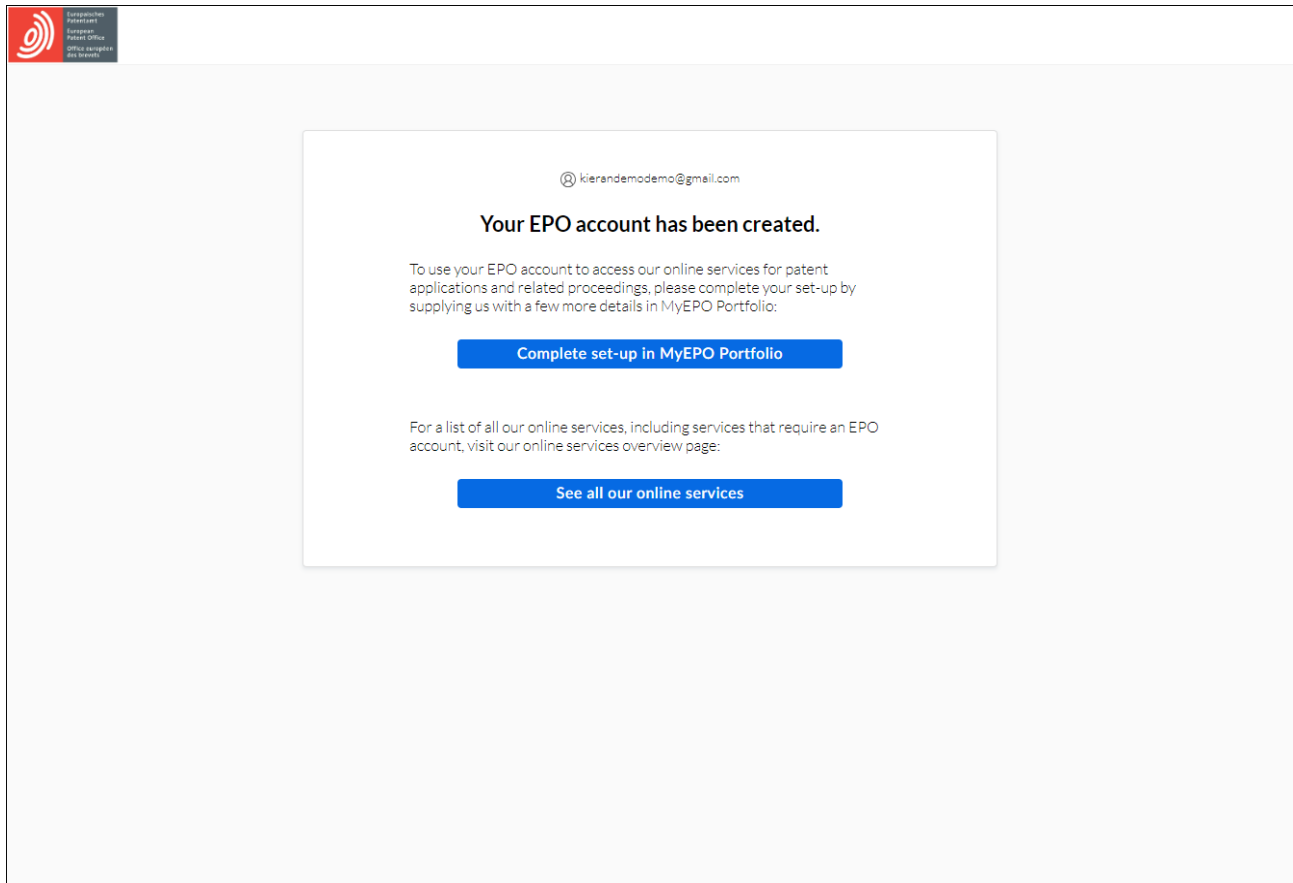
The screenshot shows the 'Select verification methods' page for the user @kierandemodemo@gmail.com. The page is titled 'Select verification methods' and includes a sub-header: 'We use two-step verification to make signing in more secure. Select one of the options below:'. There are two main options: 'Most secure option: verify my identity using some of the following:' (selected with a blue dot) and 'Verify my identity by email' (unselected with a grey dot). The 'Most secure option' includes a list of methods: 'Okta Verify', 'Google Authenticator', and 'Phone text message (SMS)'. Below the options, a note states: 'You can change the verification methods later in **Account settings**.' At the bottom, there is a blue button labeled 'Set up verification methods'. The top left corner features the EPO logo and the text 'Europäisches Patentamt / European Patent Office / Office européen des brevets'. The top right corner has a circular icon with the letters 'KD'.

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 or change your email address.

The screenshot shows the 'Set up authentication methods' page for the user @jodemodemo@gmail.com. The page is titled 'Set up authentication methods' and includes a sub-header: 'Set up one or more authentication methods.' Below this, there is a section titled 'Set up required' which lists three methods: 'Google Authenticator' (with a 'Set Up' button), 'Okta Verify' (with a 'Set up' button), and 'Phone' (with a 'Set up' button'). Each method includes a brief description of how it works. The top left corner features the EPO logo and the text 'Europäisches Patentamt / European Patent Office / Office européen des brevets'.

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.

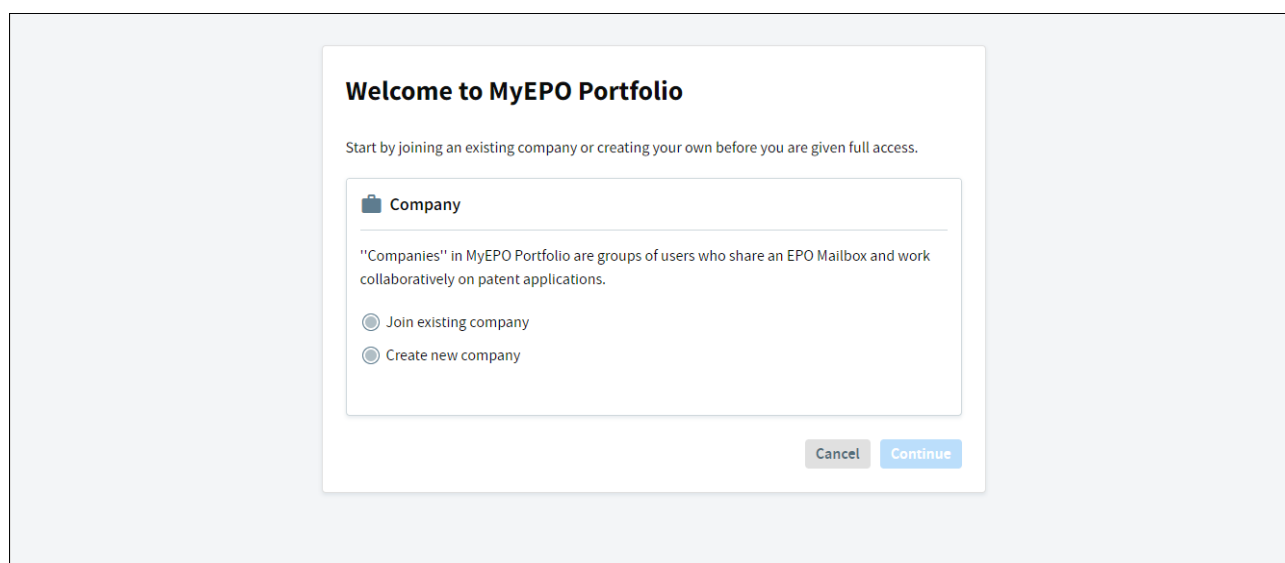
The names of your MyEPO Portfolio companies do not have a legal meaning under the European Patent Convention or PCT, nor are they shown on any official documents.

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.



**Welcome to MyEPO Portfolio**

Start by joining an existing company or creating your own before you are given full access.

**Company**

"Companies" in MyEPO Portfolio are groups of users who share an EPO Mailbox and work collaboratively on patent applications.

☒ Join existing company

☐ Create new company

Cancel Continue



If you want to join an existing company, please check with your company administrator first which is the correct company name to choose.

**Welcome**

Start by joining an existing company or creating a new company.

**Company**

"Companies" in MyEPO Portfolio are groups of users who share a Mailbox and work collaboratively on patent applications.

☒ Join an existing company  
☐ Create a new company

Company name: Demo IP Attorneys AG

Search for the company you want to join

Deposit accounts (optional): 28000000 Add

Enter the 8 digit number starting with 28

Your deposit accounts: 28000000, 28000001

Cancel Next

After selecting a company, you can select which deposit accounts your user will need access.

You will then see a message confirming that your request is pending approval by your company administrator.

✓ **Your request to join a company is pending.**

You will join the company once the administrator approves your request. If you haven't received a response in a reasonable time, you might want to contact the company.

Cancel request

## Actions for your company administrator

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

The screenshot shows the 'Company members' section of the 'Admin area' in the MyEPO Portfolio. The top navigation bar includes 'Applications and patents', 'Mailbox 3', 'Actions 13', 'Admin area' (selected), 'Representative area', and 'Preferences'. A language dropdown is set to 'English' and the user is 'RD'. The left sidebar has 'Company members' (selected), 'Mailbox recipients', and 'Mailbox settings'. The main content area is titled 'Company members' and contains two tables. The first table has columns 'Name' and 'Email address', with one entry: 'KieranDemo Demo' with email 'kierandemodemo@gmail.com'. It has 'Decline' and 'Accept' buttons. The second table has columns 'Name', 'Mailbox access', 'Fee payment rights', and 'Admin rights'. It has one entry: 'Robin Demo Representative' with 'You' as the user. The 'Mailbox access' is 'Yes', 'Fee payment rights' is 'Manage, pay and view', and 'Admin rights' is 'Yes'.

Name	Email address
KieranDemo Demo	kierandemodemo@gmail.com

Name	Mailbox access	Fee payment rights	Admin rights
Robin Demo Representative	You	Yes	Manage, pay and view

You will appear in the list of company members as soon as your request is approved.

Your company administrator should then grant you access to work on your company's filings (using the user administration functionality in Online Filing 2.0) and to work with Mailbox communications, fee payments and application portfolios as needed (using the Admin area of MyEPO Portfolio). For more details, see the [feature guide on managing user access in MyEPO Portfolio](#) and the [Online Filing 2.0 user guide](#).

If you had requested access to deposit accounts, you and your company administrator will receive an email from the EPO to inform you that the request is being processed.

### 3. 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.

**Account settings**

[Unlock settings](#)

**Name and language**

First name	Last name
Test	User99808

**Preferred language**

English

**Email address**

robindemodemo@gmail.com

**Password**

.....

**Two-factor authentication methods**

- Okta Verify app (iOS/Android)
- ☒ Google Authenticator app (iOS/Android)
- Security key or biometric authentication
- Phone - voice call or text message (SMS)
- ☒ Email - code sent by email

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

It is important that you have access to the email address associated with your EPO account. If you change company, please always update this email address.

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 or no longer have access to an old email address.