MyEPO services

Feature guide: your EPO account and two-factor authentication
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 still aren’t 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), you should select the option to complete your setup in MyEPO Portfolio by identifying which 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 grouping users. Some large companies choose to set up multiple MyEPO Portfolio “companies” that reflect organisational structures. Others keep it simple and just use one company in MyEPO Portfolio.

When setting up a new MyEPO Portfolio company, you can give the company any name you wish.

For example, it could be the actual name of your company as a legal entity, or the name of a specific geographical team or business area within your company.

The names of your MyEPO Portfolio companies don’t 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 specific MyEPO Portfolio company for you, and you will be the company administrator for your “company”.

Your personal EPO account can only be linked to one MyEPO Portfolio company at any time.

What you should do as a new user for a company

When you sign in to MyEPO Portfolio, if you are not yet linked to a company, you will be offered the choice to create a new company or join an existing company.
To join an existing company, you will be asked to search for the company name. If multiple companies appear in your search, you will see the company address for each one. If you still aren’t sure which company to select, please get in touch with your company administrator(s) for MyEPO services.

After selecting a company, a message appears informing you that your request is pending approval by the company administrator.
What your company administrator needs to do

The company administrator should sign in to MyEPO Portfolio and go to the “Company members” option in the Admin area, and accept your request to become a member of the company.

Your user will immediately appear in the list of company members.

The company administrator should then assign you further access rights to work on your company’s filing, Mailbox communications, fee payments and application portfolios as needed.

Company administrators do this using the administration options in MyEPO Portfolio and Online Filing 2.0. For more detail, 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, please note 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 to this special screen using your EPO smart card and PIN.

After signing in, you will be asked to provide the email address that you will use to sign in to your account, and to continue you need to accept the terms and conditions for EPO online services electronic infrastructure.

Next, set your 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 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 EPO account settings page.

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