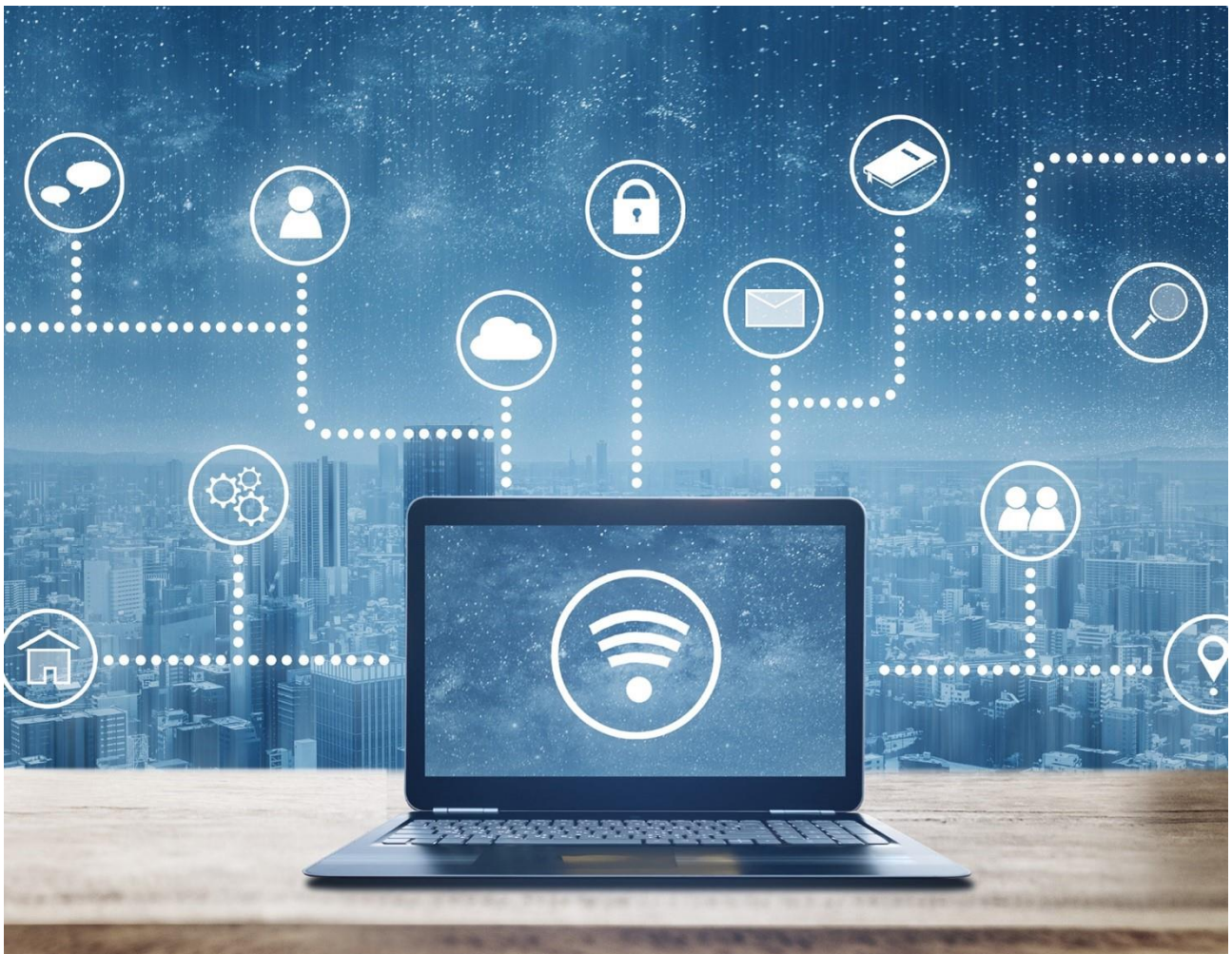


MyEPO Portfolio

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.

As an applicant or opponent, you may represent yourself and perform procedural acts during proceedings, but only if you have your residence or principal place of business in an EPC contracting state.

If your residence or principal place of business isn't in an EPC contracting state, you 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 your place of resident or business is in an EPC contracting state, you 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.

They can also delegate this to members of their IP support team.

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.

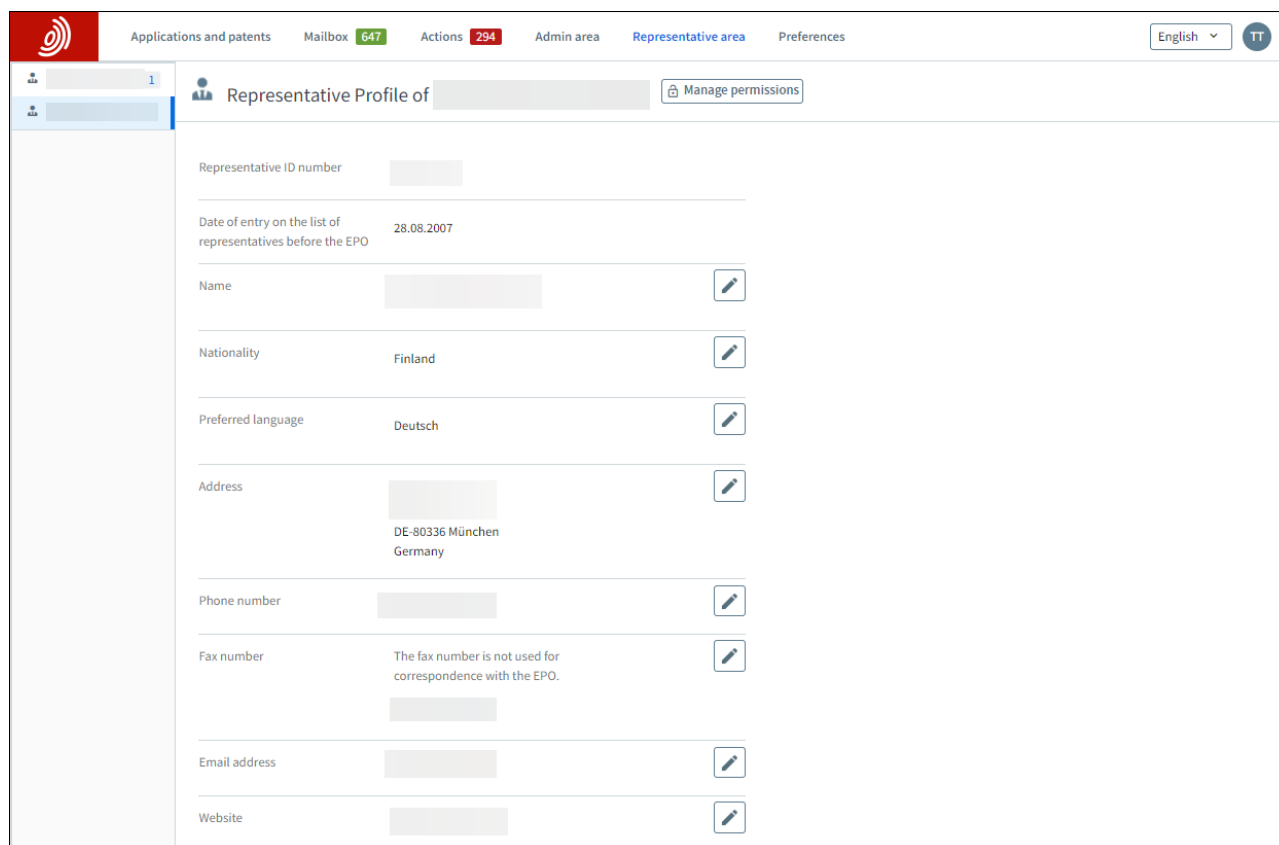
We have also published some [frequently asked questions \(FAQs\)](#), and you can always get in touch with us at epo.org/support or your key account manager if you're still not sure about something.

2. 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.

2.1 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' page in the MyEPO Portfolio. The page has a top navigation bar with the following items: Applications and patents, Mailbox (647), Actions (294), Admin area, Representative area (selected), and Preferences. There is also a language dropdown set to 'English' and a 'TT' icon. The main content area is titled 'Representative Profile of [redacted]' and includes a 'Manage permissions' button. The profile details are as follows:

Representative ID number	[redacted]	
Date of entry on the list of representatives before the EPO	28.08.2007	
Name	[redacted]	[edit icon]
Nationality	Finland	[edit icon]
Preferred language	Deutsch	[edit icon]
Address	[redacted] DE-80336 München Germany	[edit icon]
Phone number	[redacted]	[edit icon]
Fax number	The fax number is not used for correspondence with the EPO. [redacted]	[edit icon]
Email address	[redacted]	[edit icon]
Website	[redacted]	[edit icon]

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

2.2 Request changes to your representative profile

Click on 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.

The screenshot shows the 'Request changes' form in the MyEPO interface. The top navigation bar includes 'Applications and patents', 'Mailbox 647', 'Actions 294', 'Admin area', 'Representative area', and 'Preferences'. The language is set to 'English'.

The form contains the following sections:

- Website:** A text input field containing 'http://www', a 'Remove' button, and an 'Add a website' link.
- Publication of entry details in the Official Journal of the EPO:** A toggle switch set to 'Yes'.
- Publication of personal data in EPO searchable database:** A toggle switch set to 'Yes'.
- Publication of full postal address in EPO searchable database:** A toggle switch set to 'Yes'.
- Telecommunication details and their publication in the searchable database on the EPO website:** A toggle switch set to 'Yes'.
- Publication of phone number:** A toggle switch set to 'Yes'.
- Publication of fax number:** A toggle switch set to 'Yes'.
- Publication of email address:** A toggle switch set to 'Yes'.
- Publication of website:** A toggle switch set to 'Yes'.
- Date of change:** Two radio buttons: 'as soon as possible' (unselected) and 'with effect from:' (selected). Below the 'with effect from:' radio button is a date input field with the placeholder 'dd.mm.yyyy'.

At the bottom of the form, there are two buttons: 'Request deletion from the list' and 'Request changes'.

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

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.

The EPO will process the request and changes to your details in the database will be published in the EPO Official Journal. 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.

2.3 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 clicking on **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. The top navigation bar includes '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 content area is titled 'Request for deletion from the list of professional representatives before the European Patent Office'. Below the title, there is a text box containing the following text:

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 text are two links: [Article 134a\(2\) EPC](#) | [Rule 154\(3\) EPC](#).

The 'Date of deletion' section has two radio button options:

- as soon as possible
- with effect from:

 The second option is followed by a date input field with a calendar icon and the placeholder text 'dd.mm.yyyy'.

Below the date selection is a section for 'Alternative contact details (optional)'. It contains the text: 'I would like the EPO to use the contact details below - instead of the contact details in my profile - for any communication in relation to this request.'

Under this section, there is an 'Address' label and a 'Company / organisation' label, both followed by empty input fields.

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.

2.4 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.

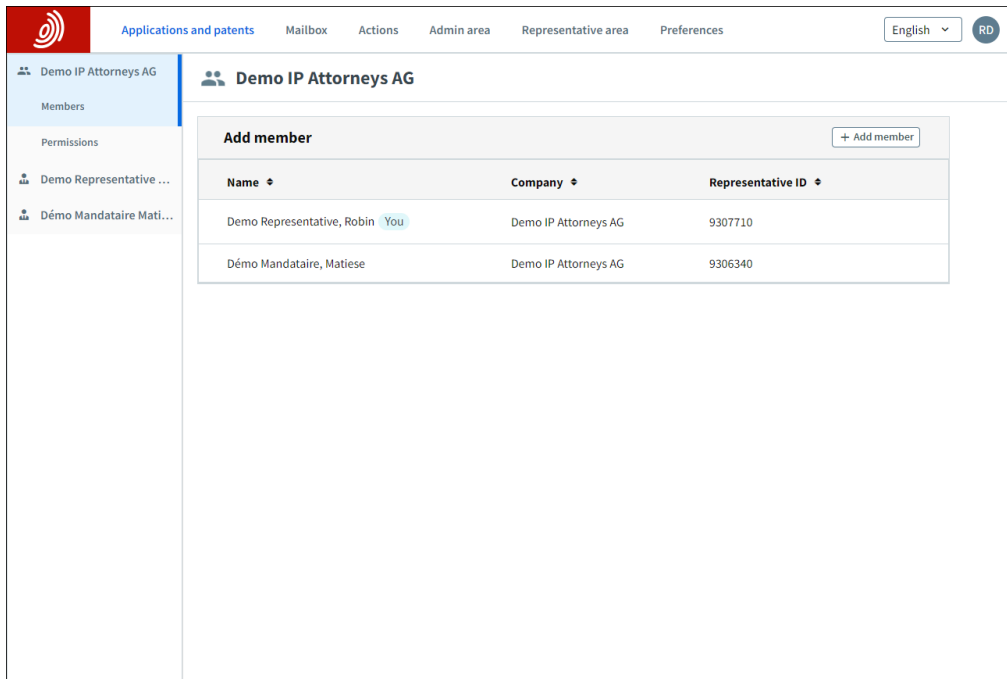
You can select the option to remedy the deficiency or choose to withdraw your request.

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

3. 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 pick the Members option.



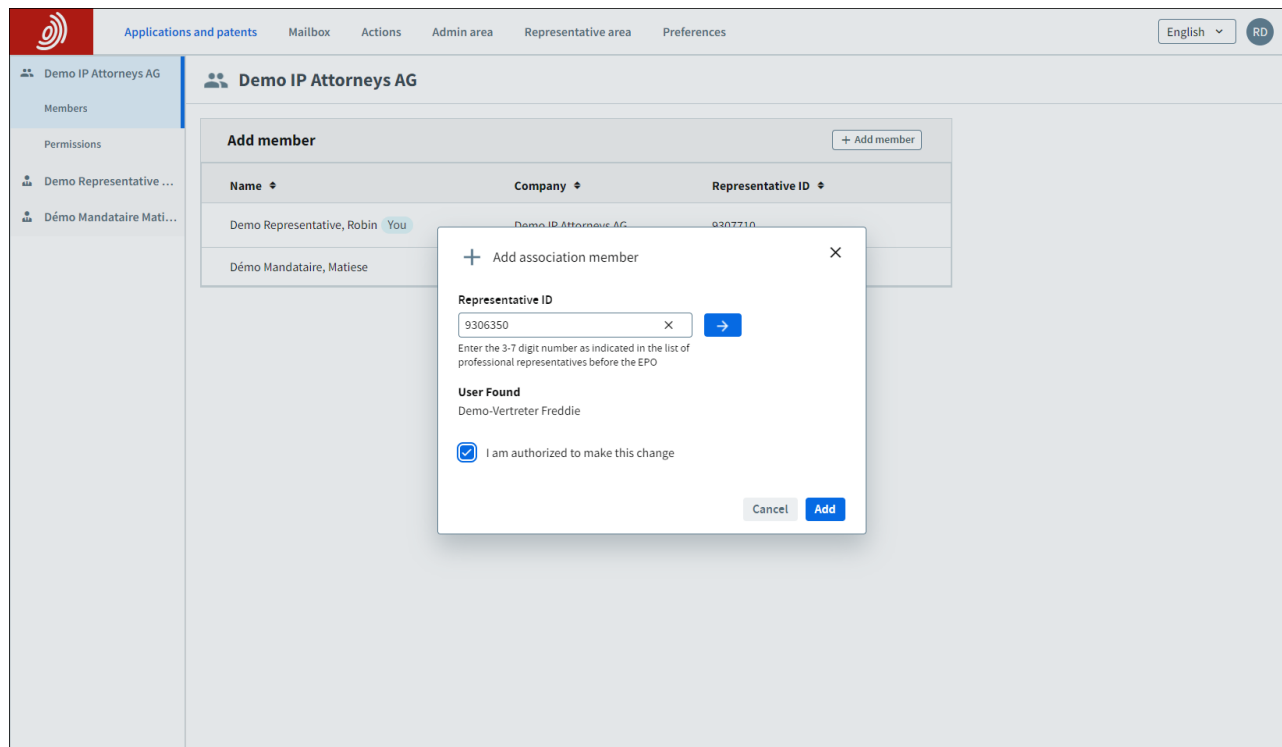
The screenshot displays the MyEPO Portfolio interface. The top navigation bar includes 'Applications and patents', 'Mailbox', 'Actions', 'Admin area', 'Representative area', and 'Preferences'. A language dropdown is set to 'English' and a user profile icon 'RD' is visible. The left sidebar shows a tree view with 'Demo IP Attorneys AG' selected, and sub-items 'Members', 'Permissions', 'Demo Representative ...', and 'D mo Mandataire Mati...'. The main content area is titled 'Demo IP Attorneys AG' and features an 'Add member' button. Below this is a table with the following data:

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

3.1 Add a member to an association

Click on the **Add member** button and enter the Representative ID 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.



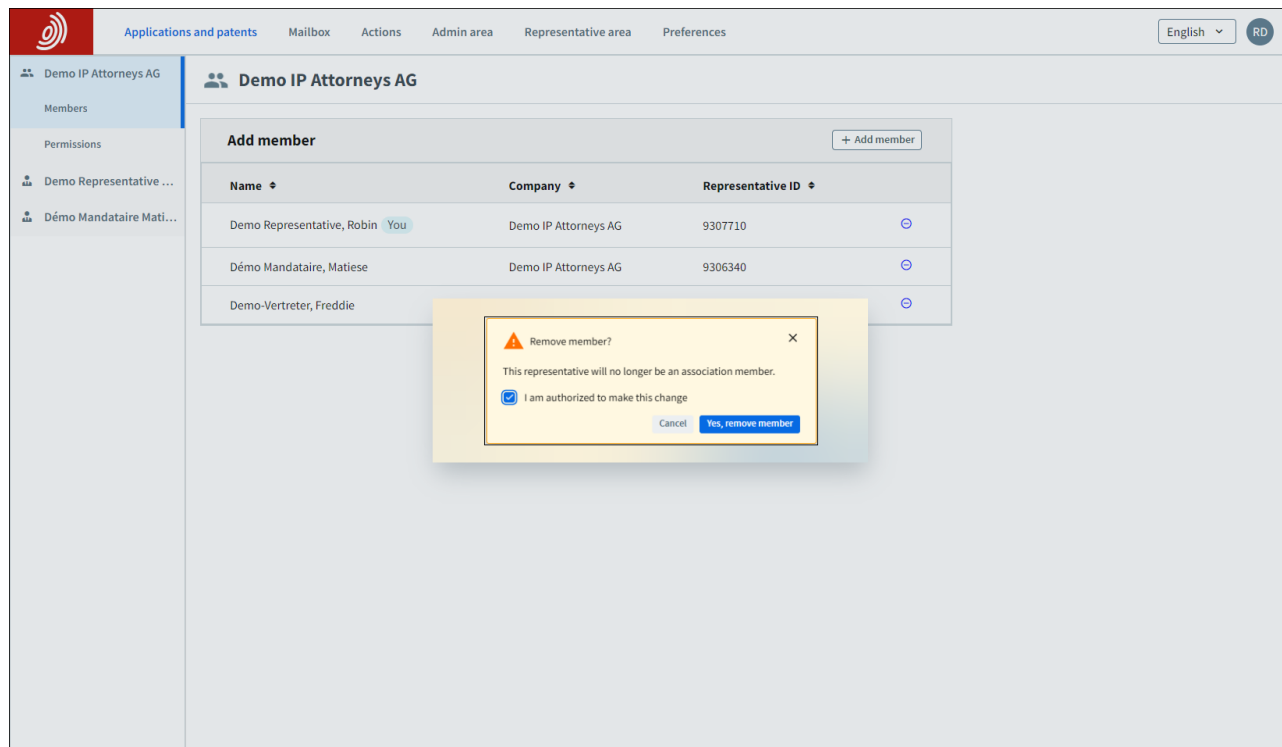
If you add or remove members of an association, a communication will be sent to your Mailbox (or postal address of the association if the association is not receiving communications electronically via the Mailbox) listing all additions and removals that took place that day.

The change takes effect immediately.

3.2 Remove a member from an association

Click on the **deletion symbol** next to the name of the member that you wish to remove from the association.

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 with the following data:

Name	Company	Representative ID	
Demo Representative, Robin You	Demo IP Attorneys AG	9307710	⊘
Démo Mandataire, Matiese	Demo IP Attorneys AG	9306340	⊘
Demo-Vertreter, Freddie			⊘

A confirmation dialog box titled "Remove member?" is overlaid on the table. It contains the following text and controls:

Remove member? [X]

This representative will no longer be an association member.

I am authorized to make this change

Cancel Yes, remove member

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.