

MyEPO Portfolio

Feature guide: accessing your portfolios and documents



Content

1.	Introduction	2
2.	Working with your portfolios and documents	2
2.1	Get access to the Applications and patents area	2
2.2	Work with your portfolios	4
2.3	Work on an application	5

1. Introduction

With MyEPO Portfolio users can view public information about any published EP or Euro-PCT application, view and work on their portfolios of EP patent applications, including direct access to the digital files associated with each EP application. You can do this as a representative, or as a company member provided you have access to MyEPO Portfolio and been granted permission to access portfolios by the company administrator.

The **Applications and patents** area of MyEPO Portfolio makes it easy for you, and in this feature guide we provide an overview of how it works.

The Applications and patents area of MyEPO Portfolio replaces the [legacy My Files tool](#), which will be decommissioned in June 2024.

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

2. Working with your portfolios and documents

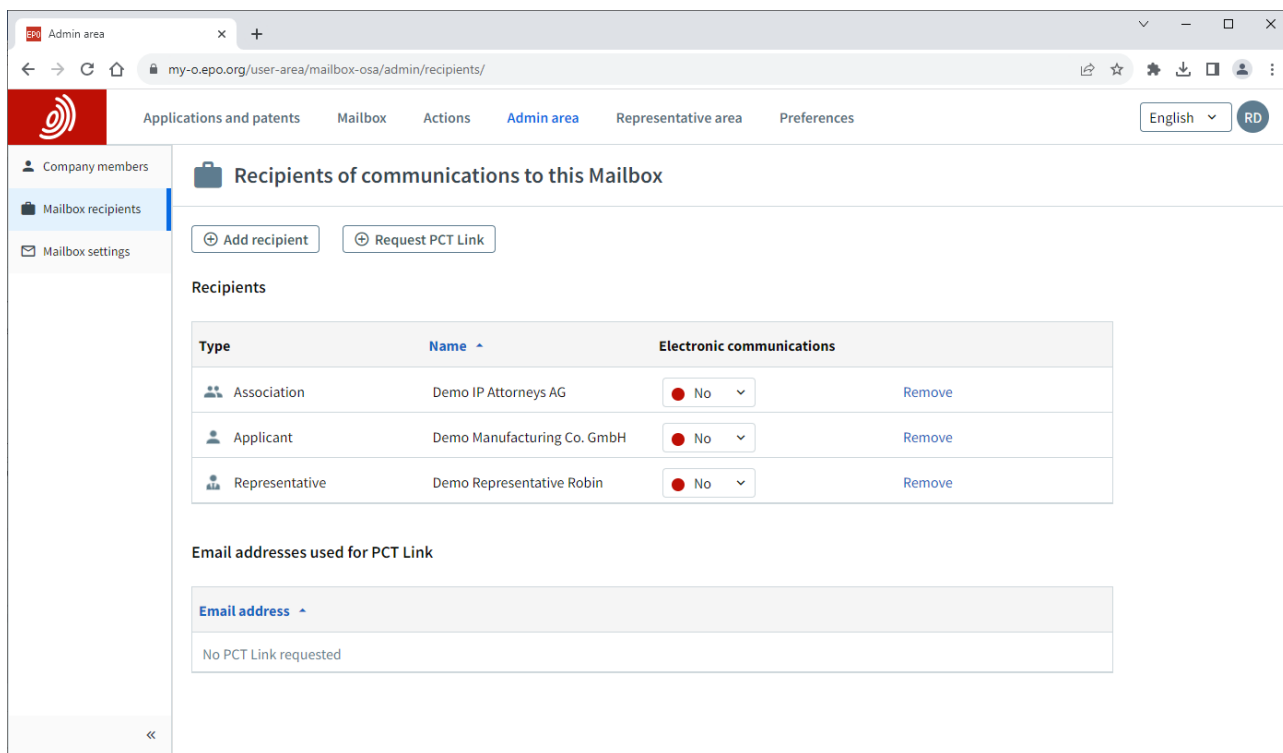
2.1 Get access to your portfolios of applications

All users of MyEPO Portfolio have access to the **Applications and patents** area and you can view public information about any published EP or Euro-PCT application, including applications that aren't part of your portfolios. You can also request certified copies, transfer of rights and register licences.

In addition, you can view both public and non-public information about the applications in your company's portfolios, but first your company administrator must set up recipients and grant permissions as follows:

As a company administrator, you first go the **Admin area** and use the **Mailbox recipients** tab to request to add "recipients" for whom electronic communications can be sent to the company mailbox and whose portfolios can be accessed in MyEPO Portfolio.

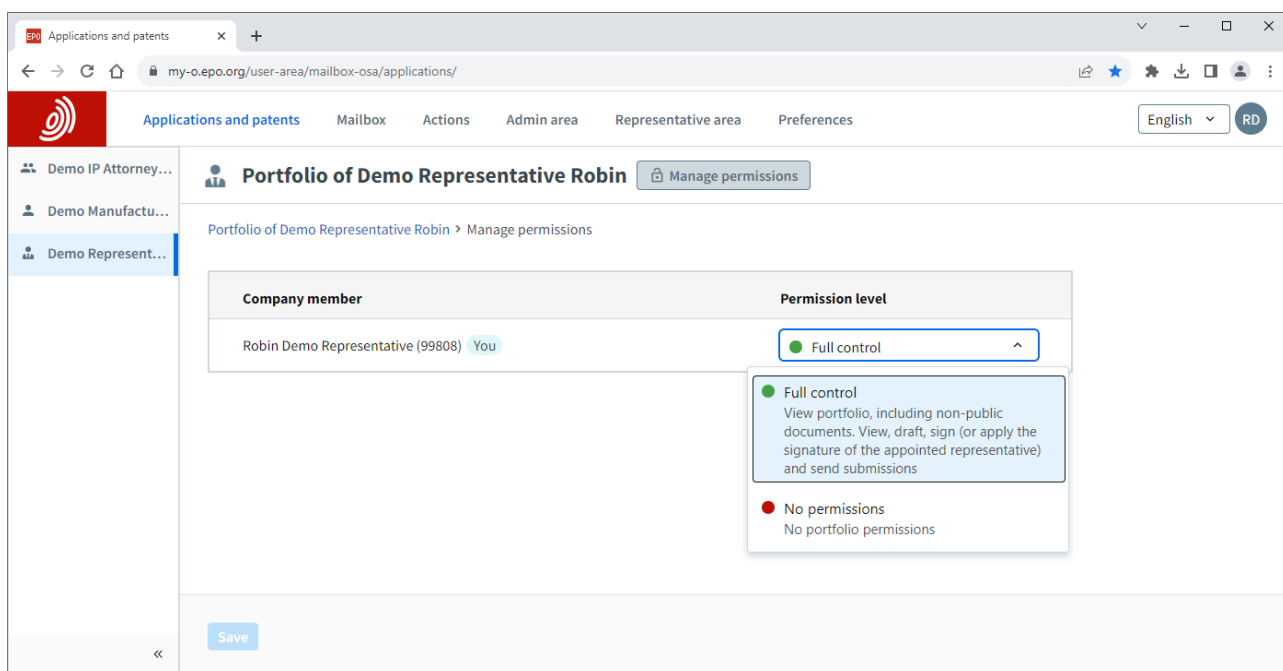
A "recipient" can be a European representative, an association of European representatives, a lawyer or a self-representing party (applicant, proprietor, opponent/intervener or appellant).



The EPO will check each request to add a recipient, which may take several working days.

Once your request has been validated, all recipient portfolios will appear in the **Application and patents** area.

As company administrator you can select a recipient's portfolio and use the **Manage permissions** option to identify which users within your company can access the portfolio.



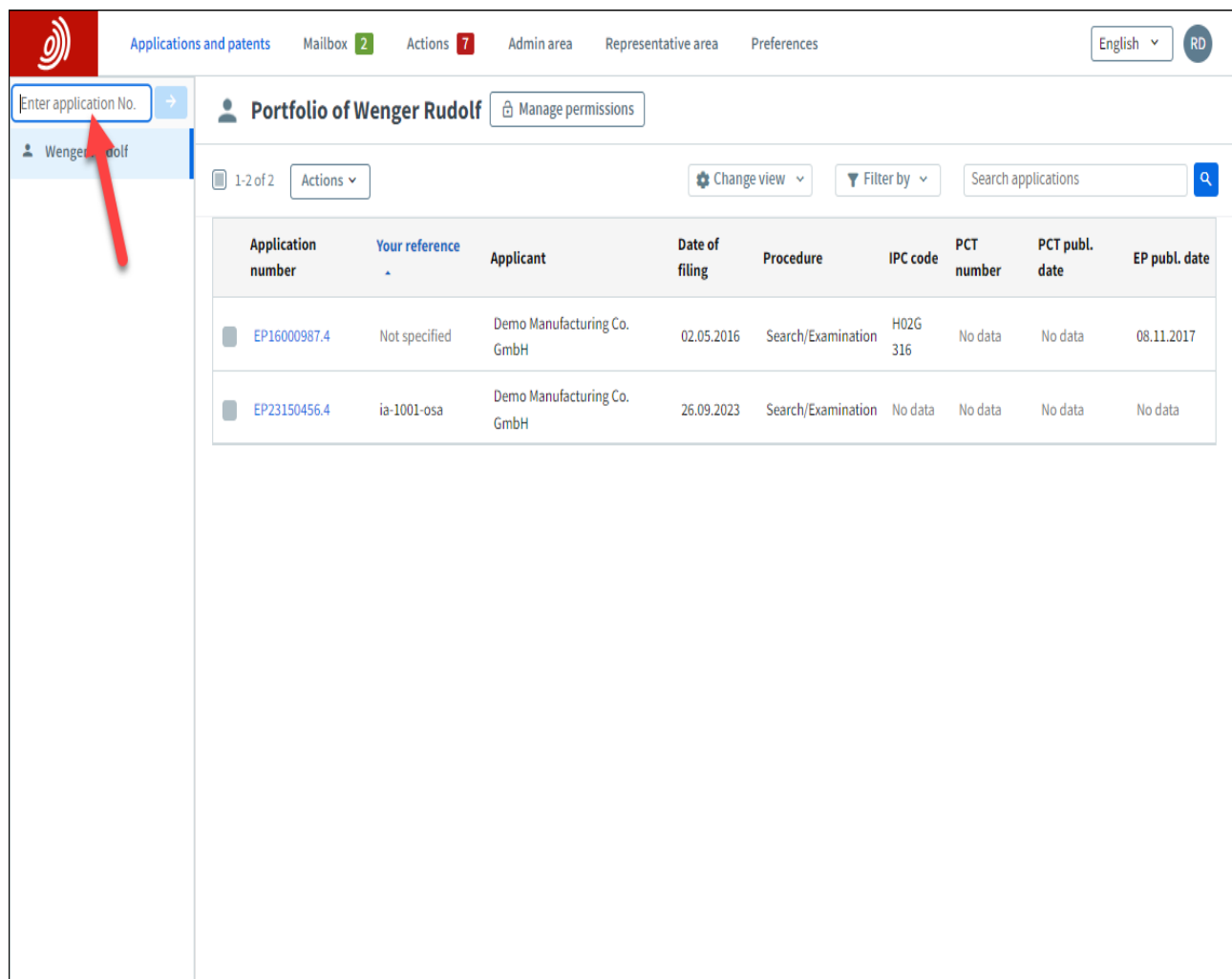
When you grant “Full control” to a user, they will be able to

- See applications for the representative or association, including unpublished applications.
- See documents for those applications, including non-public documents.
- Perform procedural actions and submit requests for the applications: draft submissions and fee payments, sign and send to the EPO. *Please note that some actions and requests are not currently available to self-representing applicants.*

For more information on MyEPO Portfolio companies and users, please see the [feature guide on managing user access in MyEPO Portfolio](#).

2.2 Work with your portfolios

In the **Applications and patents** area of MyEPO Portfolio, you can enter the number of any EP or Euro-PCT application on the left-hand side to access public information about that application, request certified copies, transfer of rights and register licences.



The screenshot displays the 'Applications and patents' section of the MyEPO Portfolio. The top navigation bar includes links for 'Applications and patents', 'Mailbox' (with a '2' badge), 'Actions' (with a '7' badge), 'Admin area', 'Representative area', and 'Preferences'. The user's name 'RD' is visible in the top right corner. The left sidebar features a search bar labeled 'Enter application No.' with a red arrow pointing to it, and a list of portfolios, including 'Wenger Rudolf'. The main content area shows the 'Portfolio of Wenger Rudolf' with a 'Manage permissions' button. Below this, there are controls for '1-2 of 2' items, an 'Actions' dropdown, 'Change view', 'Filter by', and a search bar. A table lists the applications:

Application number	Your reference	Applicant	Date of filing	Procedure	IPC code	PCT number	PCT publ. date	EP publ. date
EP16000987.4	Not specified	Demo Manufacturing Co. GmbH	02.05.2016	Search/Examination	H02G 316	No data	No data	08.11.2017
EP23150456.4	ia-1001-osa	Demo Manufacturing Co. GmbH	26.09.2023	Search/Examination	No data	No data	No data	No data

On the left-hand side you can also see the list of your company’s application portfolios for which you have been granted access by your company administrator (see section 2.1). When you select a portfolio, you can view the list of applications in that portfolio.

App number	Applicant	Date of filing	Procedure	IPC code	PCT number	PCT publ. date	EP publ. date
EP1816016.5	Demo IP Attorneys AG	07.01.2019	Search/Examination	H01R 1352	No data	No data	10.07.2019
EP20173873.9	70880PEP	11.05.2020	Search/Examination	G06F 16532	No data	No data	02.06.2021
EP20193077.3	Demo	27.08.2020	Search/Examination	H01L 23485	No data	No data	22.09.2021
EP21201100.1	Demo	06.10.2021	Search/Examination	No data	No data	No data	No data
EP16001180.5	DEMO A3	24.05.2016	Search/Examination	G06F 1750	No data	No data	30.11.2016
EP16001095.5	DEMO A5	13.05.2016	Search/Examination	F16F 709	No data	No data	07.12.2016
EP20193078.1	DEMO A8	27.08.2020	Search/Examination	B25J 916	No data	No data	16.06.2021
EP21197681.6	Demo Clar	06.12.2012	Search/Examination	G06F 314	No data	No data	30.03.2022
EP1816016.5	Matthias DPMA Wor	07.03.2018	Search/Examination	E04G	No data	No data	12.09.2018

There are smart filters that prevent unauthorised users from seeing non-public applications.

You can search and filter applications, and perform actions on one or more of the applications:

- Download information about the applications to a CSV file that you can open in Excel or upload to your IP management systems.
- Submit procedural requests about the applications, such as change of representation. *Please note that these actions are not currently available to self-representing applicants.*

For more information on submitting procedural requests about applications, please see the [feature guide on submitting procedural requests](#).

2.3 Work on an application

When you click on an application number in the **Applications and patents** area, you will be taken to a screen with information and options to work on the application.

EP19150571.8 Your reference: 1234567 Applicant: Demo IP Attorneys AG

Documents	Date	Title	Code	Process
Shared area	22.11.2023	Miscellaneous requests concerning client ...	CD-MISC-E	Search
Procedural actions	27.10.2023	Communication of the registration of a tr...	2544	Search
Due fees	16.12.2020	Communication from the Examining Divis...	2001	Search
New Requests	16.12.2020	Annex to the communication	2906	Search
	08.11.2020	Letter accompanying subsequently filed it...	1038	Search
	08.11.2020	Reply to communication from the Examin...	EXRE3	Search
	08.11.2020	Amended claims with annotations	CLMS-HWA	Search
	08.11.2020	Claims	CLMS	Search
	08.11.2020	(Electronic) Receipt	RECEIPT-OLF	Search
	10.07.2020	Communication from the Examining Divis...	2001	Search
	10.07.2020	Annex to the communication	2906	Search
	06.07.2020	Examination started	EX-START	Search
	10.01.2020	Letter accompanying subsequently filed it...	1038	Search
	10.01.2020	Amendments received before examination	ABEX	Search
	10.01.2020	Amended description with annotations	DESC-HWA	Search

Communication

concerning the registration of amendments relating to

☐ a transfer (R. 22 and 85 EPC)

☒ entries pertaining to the applicant / the proprietor (R. 143(1)(f) EPC)

As requested, the entries pertaining to the applicant of the above-mentioned European patent application / to the proprietor of the above-mentioned European patent have been amended to the following:

AL AT BE BG CH CY CZ DE DK EE ES FI FR GB GR HR HU IE IS IT LI LT LU LV
MC MK MT NL NO PL PT RO RS SE SI SK SM TR

Demo IP Attorneys AG
European Patent Office
Bob-von-Berthelm-Platz 1
80469 München/DE

The registration of the changes has taken effect on 24.10.23.

In the case of a published application / a patent, the change will be recorded in the European Patent Register and published in the European Patent Bulletin (Section I.12 / II.12).

Important note for EPO deposit account holders

If you would like to have fee refunds credited to a deposit account held with the EPO, you should ensure that you provide clear and up-to-date refund instructions to this effect, using one of the permitted electronic means of filing (see Arrangements for deposit accounts (ADA)).

Important note for users of the automatic debiting procedure

If a transfer is registered, any existing automatic debit order will cease to be effective only from the date of

The **Documents** tab on the left-hand side gives you access to the digital files associated with the application. There are smart filters that prevent unauthorised users from seeing non-public documents. You can select, view, print, and download each document.

The **Shared area** tab only appears if the application is part of your company's portfolio. It gives you access to a space where you can initiate live online interaction with EPO examiners on substantive content related to your application. For more information, please see the [feature guide on the shared area](#).

The **Procedural actions** tab only appears if the application is part of your company's portfolio. It allows you to perform pending procedural actions, such as replying to communications from the EPO. For more information, please see the [feature guide on replying to communications with deadlines](#). *Please note that these actions are not currently available to self-representing applicants.*

The **Due fees** tab only appears if the application is part of your company's portfolio. It is where you can view pending fees (EP pre-grant) for the application and use Central Fee Payments to process them.

The **New requests** tab allows you to submit procedural requests about the application, such as requests to change bibliographic data. If the application isn't in your company's portfolio, only limited types of request are possible. For more information, please see the [feature guide on submitting procedural requests](#).