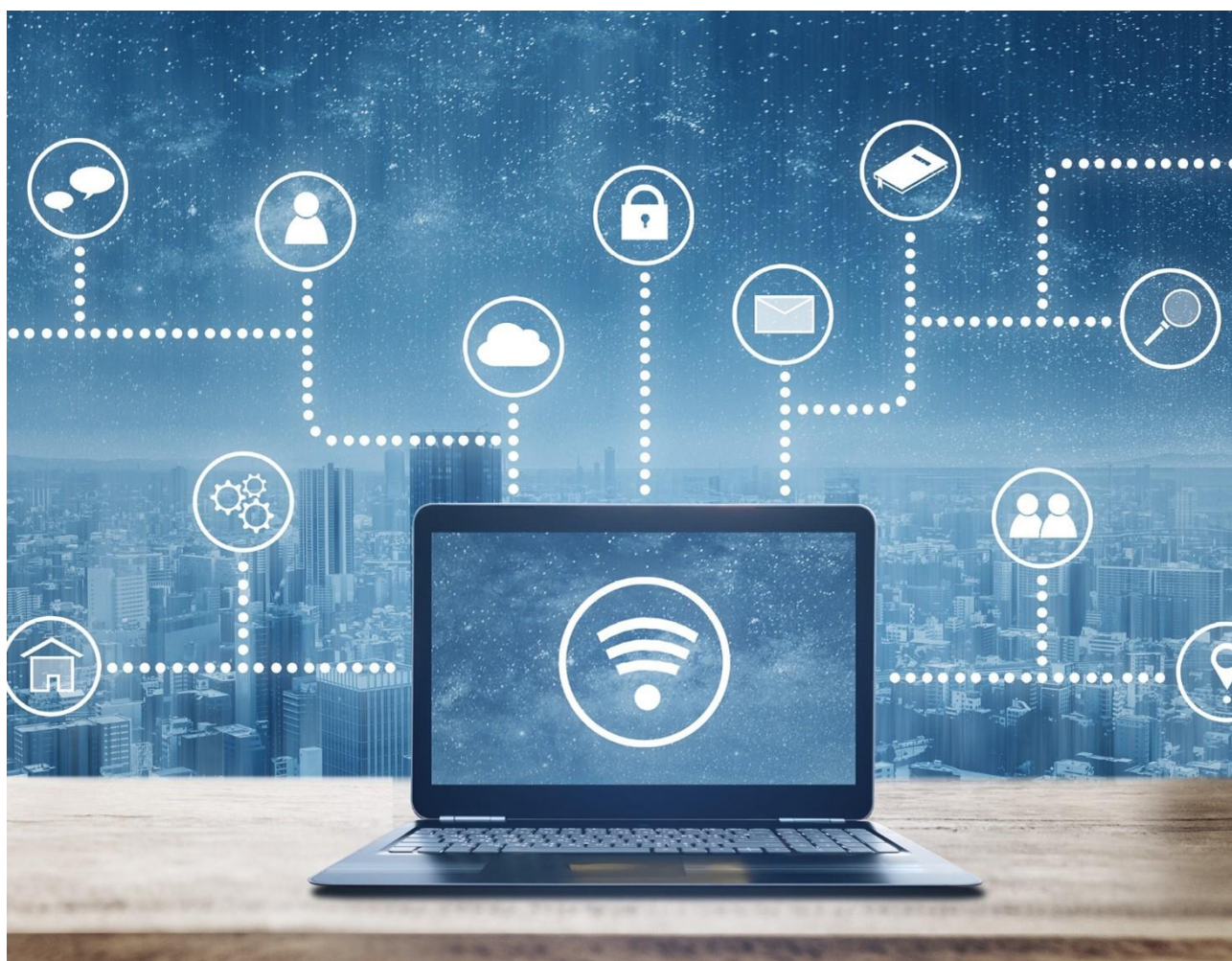


# MyEPO Portfolio

Feature guide: submitting procedural requests about applications in MyEPO Portfolio



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## 1. Introduction

As you work with the EPO on your patent applications, there will be moments when you need to tell us about changes to your cases.

For example, the inventor's name might have changed, the attorney representing the applicant has decided to stop working on the case and has handed it over to another attorney firm, or the applicant has decided not to pursue the application further and wishes to withdraw the application.

Such changes can happen at any time during the patent granting procedure, and it is important that you let us know as soon as possible.

The **Applications and patent** area of MyEPO Portfolio makes it easy for you to do this, by allowing you to submit a procedural request so that our formalities team can check and process the change.

In this feature guide, we explain how submitting procedural requests works in general, and provide more information about the specific requests that you can submit today in MyEPO Portfolio:

- **Request to change or withdraw the representative** assigned to an application.
- **Request changes to the bibliographic data** associated with an application (eg. inventor's name, addresses, applicants, etc).
- **Request to withdraw one or more applications.**
- **Request to register a transfer of rights (change of ownership) for one or more applications** (PLEASE NOTE: This feature is currently only available to users from pilot companies. Once pilot phase 4 successfully completes in 2024, it will be made available to all users.)

- **Manage registration of licences and other rights** (PLEASE NOTE: This feature is currently only available to users from pilot companies. Once pilot phase 4 successfully completes in 2024, it will be made available to all users.)
- **Request certified copies** (PLEASE NOTE: This feature is currently only available to users from pilot companies. Once pilot phase 4 successfully completes in 2024, it will be made available to all users.)

To guide you further, we have also published some “frequently asked questions” (FAQs), and you can always get in touch with [support@epo.org](mailto:support@epo.org) or your key account manager if you still aren’t sure about something.

## 2. How submitting procedural requests works in MyEPO Portfolio

### Who can submit procedural requests about applications in MyEPO Portfolio?

Requests for changes about applications at the EPO must be signed off by the representative assigned to the application or opposition case, or by the applicant or opponent themselves if they are self-representing and not making use of a professional representative.

In practice, many firms work with teams of paralegal or IP support staff who draft and submit requests, duly signed by the representative.

As a rule, in MyEPO Portfolio any user who has been granted access by their company administrator to work on a given portfolio of applications, will have access to the “Applications and patents” area, where they can draft, review, and submit requests.

In the case of transfer of rights and management of licences, any user of MyEPO Portfolio can submit requests for any application – the application doesn’t have to be in their portfolio.

*Please note that self-representing applicants can currently only submit requests about bibliographic data, replies to a communication under rules 161(1) and 162 EPC, transfer of rights and management of licences and other rights.*

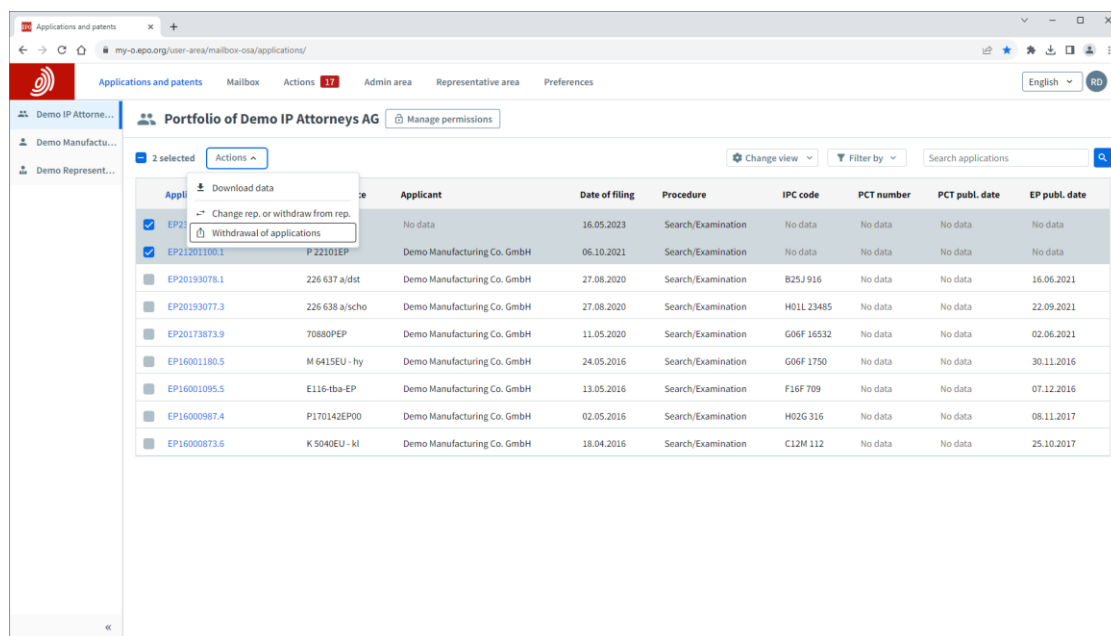
For more information about how to manage access in MyEPO Portfolio, please see the feature guide for managing user access.

For more information about how to become a user with access to our online MyEPO services, please see the “[Getting access](#)” page on the EPO website.

## Where do I go in MyEPO Portfolio to submit a request about an application?

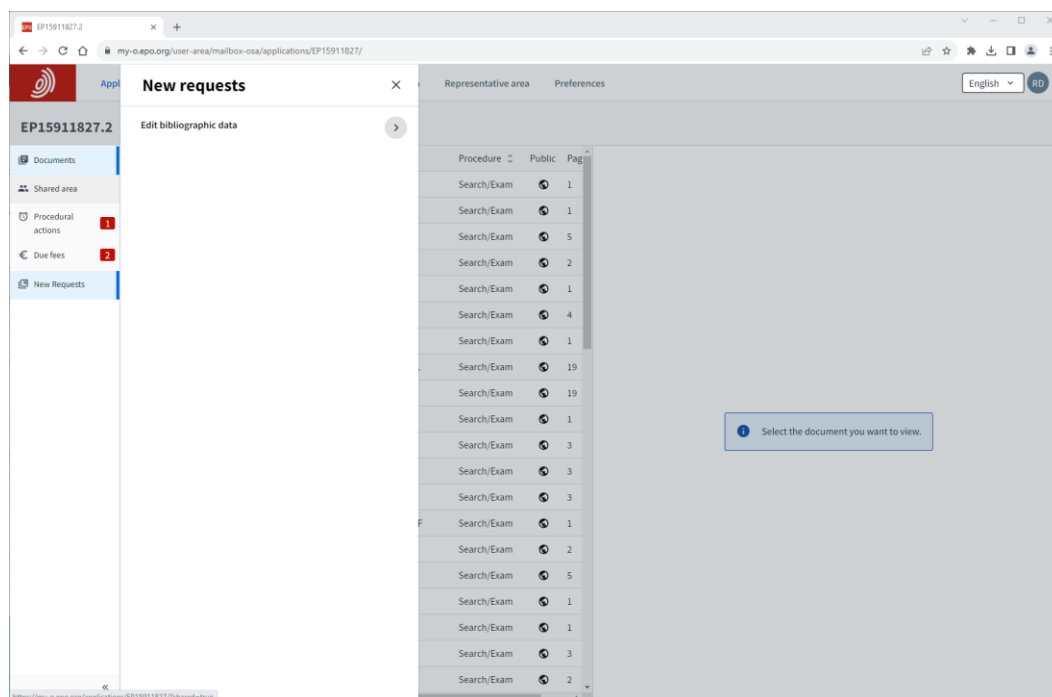
After logging into MyEPO Portfolio with your EPO account or smart card, navigate to the **Applications and patents** area.

Some requests (eg. change of representation) can be submitted for one or more applications. To do this, select the application or applications that the request is for, and then click on the **“Actions”** drop-down list at the top.



Other requests (eg. editing bibliographic data) can only be submitted for a single application.

To do this, first click on the application in question to open the application information screen, and then select the request you wish to make using the **“New requests”** option in the left menu.



## How do I draft and submit a request?

After selecting the type of request, you will be guided step-by-step to provide the information we require for your request. This may include asking you to upload documents, depending on the nature of the request.

We will indicate if any fees are payable, and you will have the option to pay them first.

When everything is ready you will be asked to review the draft submission and, if you wish, can download the submission package for review by your colleagues or the representative.

Applications and patents

my-o.epo.org/user-area/mailbox-osa/applications/

Applications and patents Mailbox Actions Admin area Representative area Preferences English RD

Select action Change representation **Review** Sign Send

### Review draft submission

[Download draft submission package](#)

- Review your draft submission carefully.
- Then submit it.

You are about to change the representation for the applications indicated below. Once the change takes effect (as soon as we receive this submission and, where applicable, after we validate any details manually entered by you), you will cease to have access to these applications in MyEPO Portfolio. Nor will EPO communications relating to these applications be sent to you.

If you are changing the representation to another representative in your company, you can also change the reference you have assigned yourself. In all other cases, the reference you have assigned yourself will be deleted.

#### New representation

Name	Address	Country
Demo IP Attorneys AG	European Patent Office Bob-van-Benthem-Platz 1 80469 München	DE

Procedure	Application number	Your reference
Search/Examination	EP23150237.8	user/ref/1234
Search/Examination	EP23150239.4	test3seema16may

[Back](#) [Ready to sign](#)

Finally, you will be prompted to add a signature to the submission.

The screenshot shows the 'Sign draft submission' page in the MyEPO interface. The page has a breadcrumb trail: 'Select action' > 'Change representation' > 'Review' > 'Sign' > 'Send'. A 'Download draft submission package' button is in the top right. The main content area has a table with columns: 'Signature', 'Function of person signing', 'Place', 'Date', and 'Remove'. A message box says 'Add at least one signature.' Below this is a '+ Add signature' button. A modal window titled 'Add signature' is open, containing the following fields and instructions:

- Add signature**  
Enter the text string signature and any other information. Then select **Add**.
- Function of person signing**  
Representative, applicant ...
- Place of signing (optional)**  
Place
- Signature**  
Signature  
A forward slash ("/") will be added automatically at the start and at the end of the signature

At the bottom of the modal are 'Cancel' and 'Add' buttons. The background page also has a 'Back' button and a 'Ready to send' button.

Fill in the function of the person whose signature should appear on the submission. For example, they could be a representative, an applicant, or an opponent. Then add the place of signing (optional) and type the name of the person in the signature box.

When you have added the signature, indicate that you are ready to send, and in the next screen you can send the submission when you are ready.

After a request has been sent, it will be added to the digital file for each application involved. You will be able to see the request in the application documents in the “Applications and patents” area.

In chapter 3, we provide additional specific instructions for different types of requests.

## What do I do if I want to make the same request about a large number of applications?

If you are transferring rights or wish to register or cancel a licence for a large number of applications, the option exists to upload a .csv file with the list of applications and make a bulk request all of them.

The screenshot displays the 'Portfolio of Wenger Rudolf' interface. At the top, there is a navigation bar with links for 'Applications and patents', 'Mailbox' (with a green badge '1'), 'Actions' (with a red badge '7'), 'Admin area', 'Representative area', and 'Preferences'. A language dropdown is set to 'English' and a user profile 'RD' is shown. On the left, a sidebar contains 'Enter application No.' with a search icon and 'Wenger Rudolf' with a user icon. The main content area is titled 'Portfolio of Wenger Rudolf' and includes a 'Manage permissions' button. Below this is a 'Back to Applications and patents' link. The primary section is 'Upload application list', which instructs the user to 'Upload a CSV file identifying the applications for which you want to take an action.' It features a '+ Select file' button, an 'Upload' button, and a dashed box for drag-and-drop. A green success message states '2 applications/patents were identified.' Below this, the 'Select an action' section shows a dropdown menu with 'Actions ^' and two options: 'Transfer of rights' and 'Manage licences and other rights'. A bottom sidebar contains a link to 'Upload application list'.

After logging into MyEPO Portfolio with your EPO account or smart card, navigate to the **Applications and patents** area.

Select the “Upload application list” available on the left-hand side to upload the .csv file with the list of applications. The file should only contain a single column with the application numbers in the standard “EPyynnnnnn.d” format.

If the format of the file is correct, you can select the action you wish to request from the list that appears.

### 3. Specific instructions for different types of requests

#### 3.1 Request change or withdrawal of representation

If you are a representative or a Rule 152(11) Association, you can request changes of representation for applications within those portfolios.

You can choose to:

- transfer the application(s) to another representative or association.
- withdraw the current appointed representative or association from representation for the selected applications.

You can do this for single applications or for several applications at a time. An individual request will be created for each application and will appear in the dossier inspection.

Any user that has been granted permission to access a portfolio can request these changes, duly signed by a representative. *Please note: this feature is not currently available for self-representing applicants.*

**Note:** you can only request change or withdrawal of representation if the application is in the search and examination phase or UP phase. It is not possible if the application is in **opposition phase**.

Applications and patents

my-o.epo.org/user-area/mailbox-osa/applications/

Applications and patents Mailbox Actions Admin area Representative area Preferences

English RD

Select action Change representation Review Sign Send

### Change representation or withdraw from representation

Select one of the following options:

☒ Change representation

☐ Withdraw from representation

#### Selected applications / patents

Your change will apply to the following applications / patents: (2) Change view 4

Procedure	Application number	Publication number	Your reference (editable)
Search/Examination	EP23150237.8		user/ref/1234
Search/Examination	EP23150239.4		test3seema16may

1 of 1

Next

#### How to request a change or withdrawal of representation

Navigate to the **Applications and patents** area.



Select the application or applications that the request is for, and then click on the “**Actions**” drop-down list at the top. You can see the option to change or withdraw representation in the list.

You will be guided through the steps, including indicating the newly appointed representative or association if relevant.

When you are ready, review, sign and send the request.

*Note: EP applications will disappear immediately from the portfolio. UP applications remain temporarily in the portfolio until further automated checks are performed.*

Once the request has been processed by the EPO, the applications will disappear from the representative’s portfolio and a transaction report will be sent to your EPO mailbox.

## 3.2 Request changes to bibliographic data

The bibliographic data for an application includes the title of the invention, classification of the invention, the date of filing, and information about the applicants, designated states in which patent protection is requested, priority claims and inventors.

You won't be allowed to change the classification or date of filing of the application, as this is information that the EPO determines on initial filing and during the "Search & Examination Phase".

However, you can request bibliographic data changes through MyEPO Portfolio for:

- the title of the invention
- the applicant(s) and the designated states in which patent protection is requested
- priority claims
- the inventor(s)

Any user that has been granted permission to access a portfolio can request these changes, duly signed by a representative. This can be done at any time up to publication of the granted patent.

### How to request changes to bibliographic data

The screenshot shows the MyEPO Portfolio interface for application EP15911827.2. The top navigation bar includes 'Applications and patents', 'Mailbox', 'Actions' (with a red badge showing 16), 'Admin area', 'Representative area', and 'Preferences'. The user is logged in as 'RD'. The left sidebar contains 'Documents', 'Shared area', 'Procedural actions' (with a red badge showing 1), 'Due fees' (with a red badge showing 2), and 'New Requests'. The main content area is titled 'Bibliographic data' and includes a progress bar with steps: 'Edit bibliographic data' (active), 'Review', 'Sign', and 'Send'. Below the progress bar, it states: 'The bibliographic data of the application are set out below. You can request the correction of any erroneous or outdated information.' The 'Title of invention' section shows three entries: EN (demo), DE (Demo Test), and FR (demo). The 'Classification' section shows H04N21/6405 and H04N21/61. A pencil icon is visible next to the title section.

Navigate to the **Applications and patents** area.

Click on the application number to go to the application information screen, and then use the "New requests" option in the left menu to start editing bibliographic data.

You will be guided through the steps. When you are ready, review, sign and send the request.

The EPO will let you know when the request has been checked and processed, and, in case of problems with the request, will get in touch with you.

*Note: changes to bibliographic data can only be requested in MyEPO Portfolio for a single application. There is no option to request changes to groups of applications. No fees are payable for changes to bibliographic data.*

### 3.3 Request withdrawal of one or more applications

If you now decide **not** to pursue one or more applications that you have already filed, you have the possibility to request to withdraw them through MyEPO Portfolio.

You can choose to:

- Withdraw an application unconditionally or
- Withdraw an application on the condition that the withdrawal results in the (partial) refund of the search fee and/or the examination fee or
- Withdraw on condition that the withdrawal prevents the publication of the application(s) (Rule 67(2) EPC).

You can do this for single applications or for several applications at a time. An individual request will be created for each application and will appear in the dossier inspection.

Any user that has been granted permission to access a portfolio can request these changes, duly signed by a representative. *Please note: this feature is not currently available for self-representing applicants.*

#### How to request withdrawal of applications

The screenshot shows a web browser window with the URL `my-o.epo.org/user-area/mailbox-osa/applications/`. The page title is 'Applications and patents'. The navigation bar includes 'Mailbox', 'Actions' (with a red badge showing '17'), 'Admin area', 'Representative area', and 'Preferences'. The user is logged in as 'RD' in English. The main content area is titled 'Withdraw one or more European patent applications'. It features a progress bar with steps: 'Withdraw' (active), 'Review', 'Sign', and 'Send'. A warning message states: 'If the withdrawal is conditional, the conditions you indicate will apply to all the applications selected. If you select both conditions, only applications fulfilling both conditions will be withdrawn. ⚠️ Withdrawing a pending patent application has serious consequences. The application will lose all legal effect.' Below this, 'The selected applications are' section shows two radio button options: 'unconditionally withdrawn' (selected) and 'withdrawn on condition that the withdrawal' (unselected). Under the conditional option, there are two checkboxes: 'results in the (partial) refund of the search fee and/or the examination fee' and 'prevents the publication of the applications (Rule 67(2) EPC)'. A box labeled '> Selected applications (2)' is visible. At the bottom, there are 'Back' and 'Next' buttons.

Navigate to the **Applications and patents** area.

Select the application or applications that the request is for, and then click on the “**Actions**” drop-down list at the top. You can see the option to withdraw applications in the list.

You will be guided through the steps. When you are ready, review, sign and send the request.

You can cancel the withdrawal at any stage until you have sent the request.

The EPO will let you know when the request has been checked and processed and will confirm any refund information for each application. In case of problems with the request, will get in touch with you.

### 3.4 Request transfer of rights for one or more applications – PILOT FEATURE

*PLEASE NOTE: This feature is currently only available to users from pilot companies. Once pilot phase 4 successfully completes in 2024, it will be made available to all users.*

You can use MyEPO Portfolio to request registration of transfer of rights (change of ownership) for a European patent application or patent.

Registrations of transfers (assignments) of European patent applications or patents are recorded in the European Patent Register at the request of an interested party and on production of documents satisfying the EPO that the transfer has taken place.

You can choose to:

- transfer rights to one applicant/proprietor for all designated states, or
- transfer rights to a mix of applicants/proprietors for specific designated states.

You can do this for single applications or for several applications at a time. An individual request will be created for each application and will appear in the dossier inspection.

Any user of MyEPO Portfolio can submit these requests and should include evidence that they are authorised by the patent or application proprietor(s) to do so.

For more information, see [Rule 22 EPC](#) or the [legal FAQ about transfer of rights](#).

#### How to request transfer of rights

Applications and patents Mailbox 2 Actions 7 Admin area Representative area Preferences English RD

Transfer of rights Evidence Sign Send

### Transfer of rights

For more information, see [Rule 22 EPC](#) or [FAQ](#)

Selected applications and patents (2) Download data .csv

Application nr.	Your reference	Applicant	Procedure
EP19150571.8	1234567	Demo IP Attorneys AG	Search/Examination
EP20173873.9	70880PEP	Demo Manufacturing Co. GmbH	Search/Examination

Choose request:

☒ Transfer rights to one applicant/proprietor for all designated states

☐ Other request ⓘ

Details of new assignee

Name

Address line 1

City / Province / Postal code

Country

Navigate to the **Applications and patents** area.

Select the application or applications that the request is for, and then click on the “**Actions**” drop-down list at the top. You can see the option to request transfer of rights in the list.

You can also 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.

For a single application, you can also click on the application number to go to the application information screen, and then use the “New requests” option in the left menu to request transfer of rights.

To transfer rights for many applications, you can also select the “Upload application list” option available on the left-hand side to upload a .csv file with the list of applications. The file should only contain a single column with the application numbers in the standard “EPyynnnnnn.d” format. If the format of the file is correct, you can select the action from the list that appears.

In all cases, you will be guided through the steps. When you are ready, review, sign and send the request.

You can cancel the transfer at any stage until you have sent the request.

The EPO will let you know when the request has been checked and processed. In case of problems with the request, we will get in touch with you.

### 3.5 Manage registration of licences and other rights – PILOT FEATURE

*PLEASE NOTE: This feature is currently only available to users from pilot companies. Once pilot phase 4 successfully completes in 2024, it will be made available to all users.*

Licences in respect of European patent applications are recorded in the European Patent Register upon request of an interested party, for example the licensee or licensor.

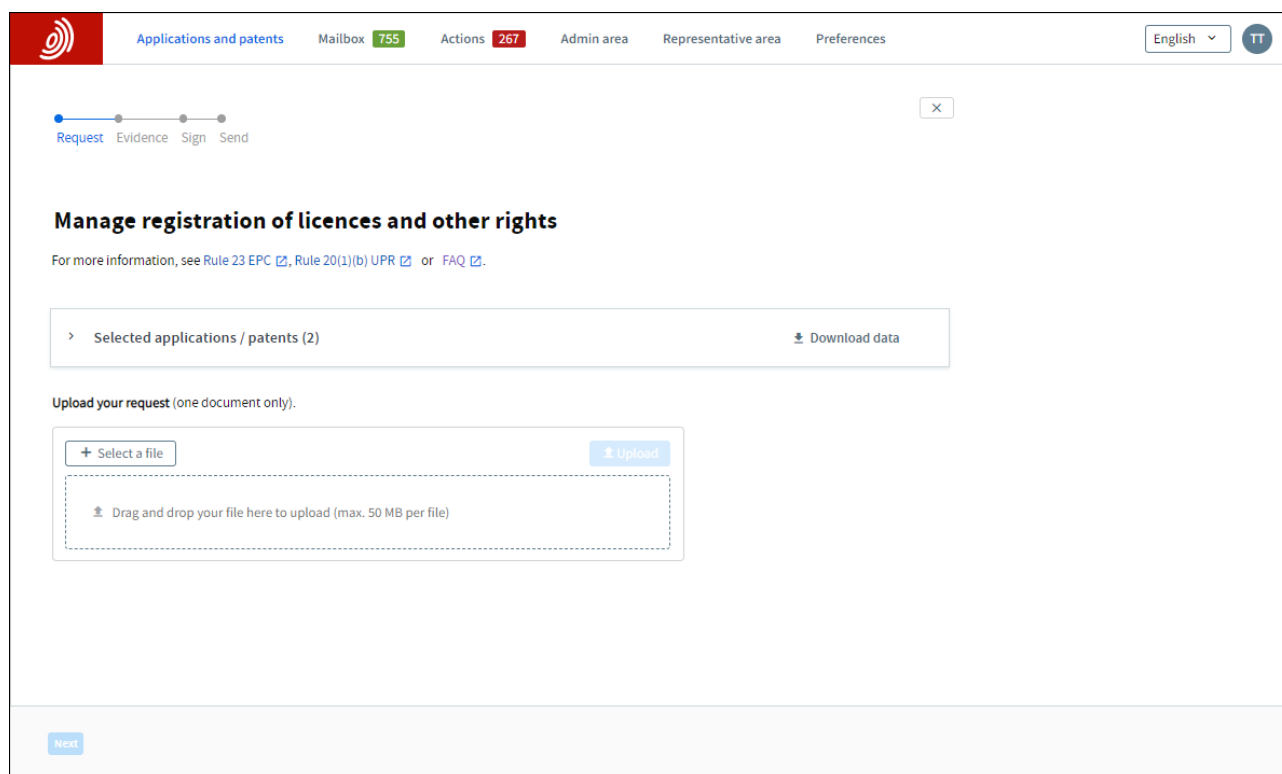
You can use MyEPO Portfolio to request registration of a licence for a European patent application, and you can do this for single applications or for several applications at a time. You can also request cancellation of the registration.

Requests for registering or cancelling a licence must be submitted with supporting evidence. You can choose to request exclusion of the attached documents from file inspection.

Any user of MyEPO Portfolio can submit these requests.

For more information, see the [Guidelines for Examination \(Licences and other rights\)](#) and the [legal FAQ about licences](#).

#### How to manage registration of licences and other rights



The screenshot displays the MyEPO Portfolio user interface. At the top, there is a navigation bar with the EPO logo, 'Applications and patents' (active), 'Mailbox 755', 'Actions 267', 'Admin area', 'Representative area', and 'Preferences'. A language dropdown is set to 'English' and a user profile icon 'TT' is visible. Below the navigation bar, a progress indicator shows four steps: 'Request' (active), 'Evidence', 'Sign', and 'Send'. The main heading is 'Manage registration of licences and other rights'. Below this, a link provides more information: 'For more information, see Rule 23 EPC, Rule 20(1)(b) UPR or FAQ'. A box labeled 'Selected applications / patents (2)' includes a 'Download data' link. The 'Upload your request (one document only)' section contains a 'Select a file' button, an 'Upload' button, and a dashed box with the instruction 'Drag and drop your file here to upload (max. 50 MB per file)'. A 'Next' button is located at the bottom left of the main content area.

Navigate to the **Applications and patents** area.

Select the application or applications that the request is for, and then click on the “**Actions**” drop-down list at the top. You can see the option to manage licences and other rights in the list.



You can also 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.

For a single application, you can also click on the application number to go to the application information screen, and then use the “New requests” option in the left menu to manage licences and other rights.

To register or cancel licences for many applications, you can also select the “Upload application list” option available on the left-hand side to upload a .csv file with the list of applications. The file should only contain a single column with the application numbers in the standard “EPyynnnnnn.d” format. If the format of the file is correct, you can select the action from the list that appears.

In all cases you will be guided through the steps. When you are ready, review, sign and send the request.

You can cancel at any stage until you have sent the request.

The EPO will let you know when the request has been checked and processed. In case of problems with the request, will get in touch with you.

### 3.6 Request certified copies – PILOT FEATURE

*PLEASE NOTE: This feature is currently only available to users from pilot companies. Once pilot phase 4 successfully completes in 2024, it will be made available to all users.*

Under the EPC, files relating to a European patent applications and European patents may be inspected. Similar provisions exist in the PCT. In this context, users may request certified copies of the following:

- Documents from the EP and UP file
- Certificates of grant (EP and UP)
- Extracts from the EP and UP Register
- Published application (A publications)
- Published patent (B publications )
- Priority documents (EP, Euro-PCT)
- Other

You can use MyEPO Portfolio to request these certified copies for a single application.

If the requester is not a party to the proceedings, the conditions for file inspection under Art. 128(1) to (4) EPC have to be met as well.

Priority documents and certified copies of the patent certificate are issued to the applicant/proprietor or the representative only.

For more information, see Art. 128 EPC Inspection of files, Rule 54 EPC Issuing priority documents, Rule 74 EPC Certificate for a European patent, Rule 152 EPC Authorisations

#### How to request certified copies

The screenshot displays the MyEPO Portfolio web interface. At the top, there is a navigation bar with links for 'Applications and patents', 'Mailbox', 'Actions', 'Admin area', 'Representative area', and 'Preferences'. The main content area is titled 'EP16000987.4' and shows the applicant 'Demo Manufacturing Co. GmbH'. A progress bar indicates the steps: 'Request for a certified copy', 'Authorisation', 'Sign', and 'Send'. The 'Request for a certified copy' step is currently active. Below the progress bar, there is a section titled 'Request for a certified copy' with a link to 'Rule 152 EPC'. A table shows 'Selected applications / patents (1)' with a 'Download data' button. Below the table, there is a section titled 'Select a type of certified copy' with a list of options: 'Priority document' (selected), 'Certificate of grant', 'Extract from the EP Register', 'Published application (A-publication)', 'Published patent (B-publication)', 'UP certificate', 'Extract from the UP Register', and 'Other'. A 'NEXT' button is located at the bottom left of the form.

Navigate to the **Applications and patents** area.

Select the application that the request is for, and then click on the “**Actions**” drop-down list at the top. You can see the option to request a certified copy in the list.

You can also 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.

For a single application, you can also click on the application number in the portfolio to go to the application information screen, and then use the “New requests” option in the left menu to request a certified copy.

In all cases you will be guided through the steps. When you are ready, review, sign and send the request.

You can cancel at any stage until you have sent the request.

The EPO will let you know when the request has been checked and processed. In case of problems with the request, will get in touch with you.