

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.)

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 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**.

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

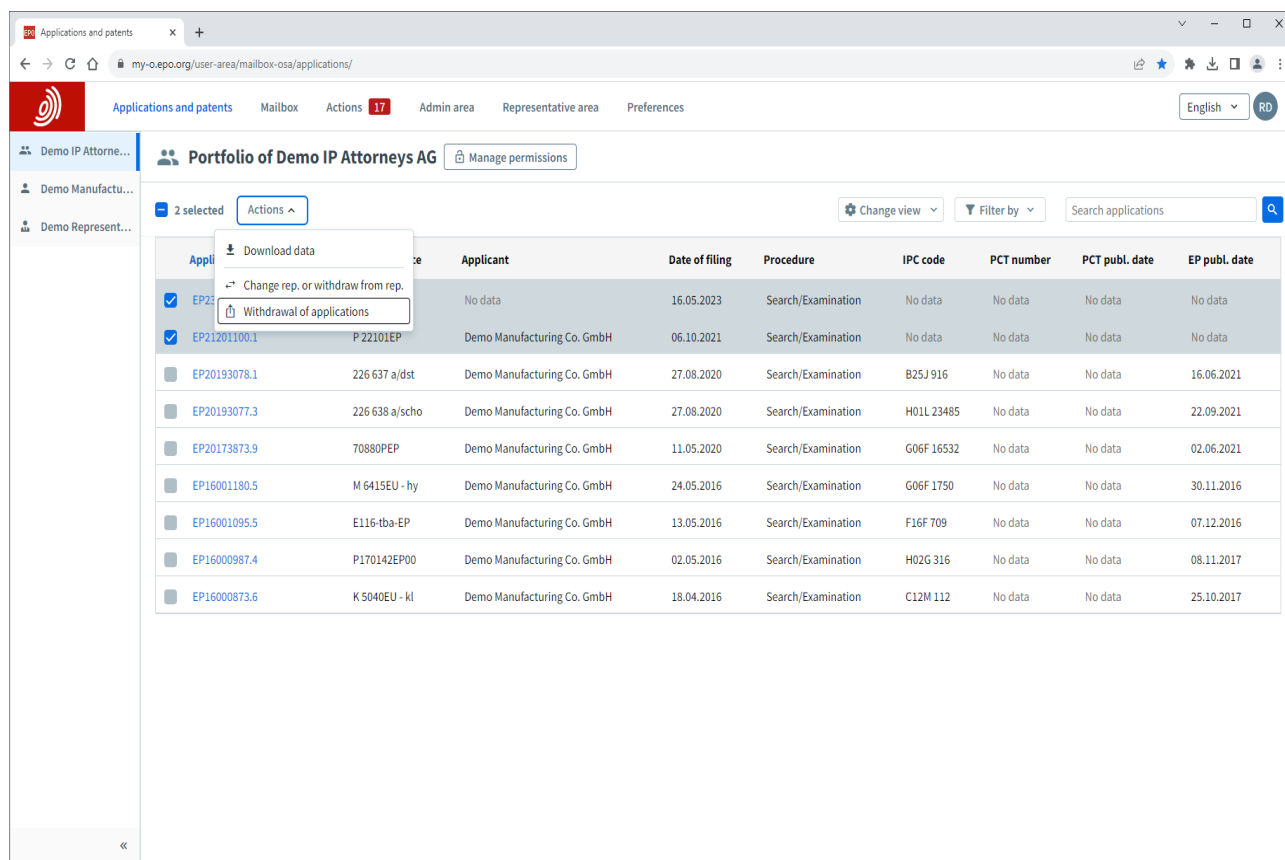
For more information about how to become a user with access to our online MyEPO services, please see the [“Getting access”](#) page on the EPO website.

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.

You will see the different requests that you can submit at any time. To get going, just click on one of them.

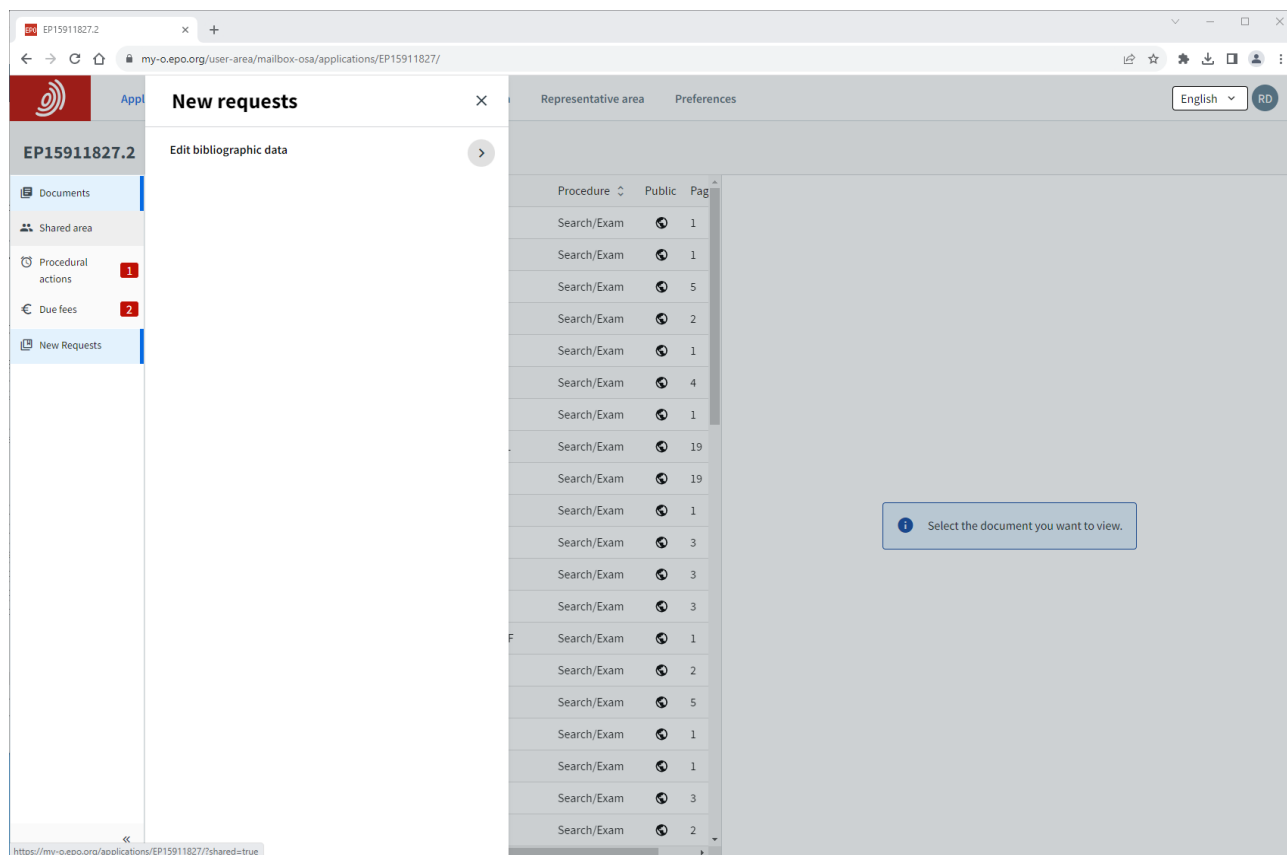


The screenshot displays the 'Applications and patents' section of the MyEPO Portfolio. The interface includes a navigation bar with 'Applications and patents', 'Mailbox', 'Actions' (with a red badge showing '17'), 'Admin area', 'Representative area', and 'Preferences'. The main content area shows the 'Portfolio of Demo IP Attorneys AG' with a 'Manage permissions' button. A table of applications is displayed, with two applications selected (indicated by blue checkmarks). A dropdown menu is open under the 'Actions' button, showing options: 'Download data', 'Change rep. or withdraw from rep.', and 'Withdrawal of applications'.

Appli	IPC code	PCT number	PCT publ. date	EP publ. date
EP21201100.1	P 22101EP	No data	No data	No data
EP20193078.1	226 637 a/dst	No data	No data	16.06.2021
EP20193077.3	226 638 a/scho	No data	No data	22.09.2021
EP20173873.9	70880PEP	No data	No data	02.06.2021
EP16001180.5	M 6415EU - hy	No data	No data	30.11.2016
EP16001095.5	E116-tba-EP	No data	No data	07.12.2016
EP16000987.4	P170142EP00	No data	No data	08.11.2017
EP16000873.6	K 5040EU - kl	No data	No data	25.10.2017

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.

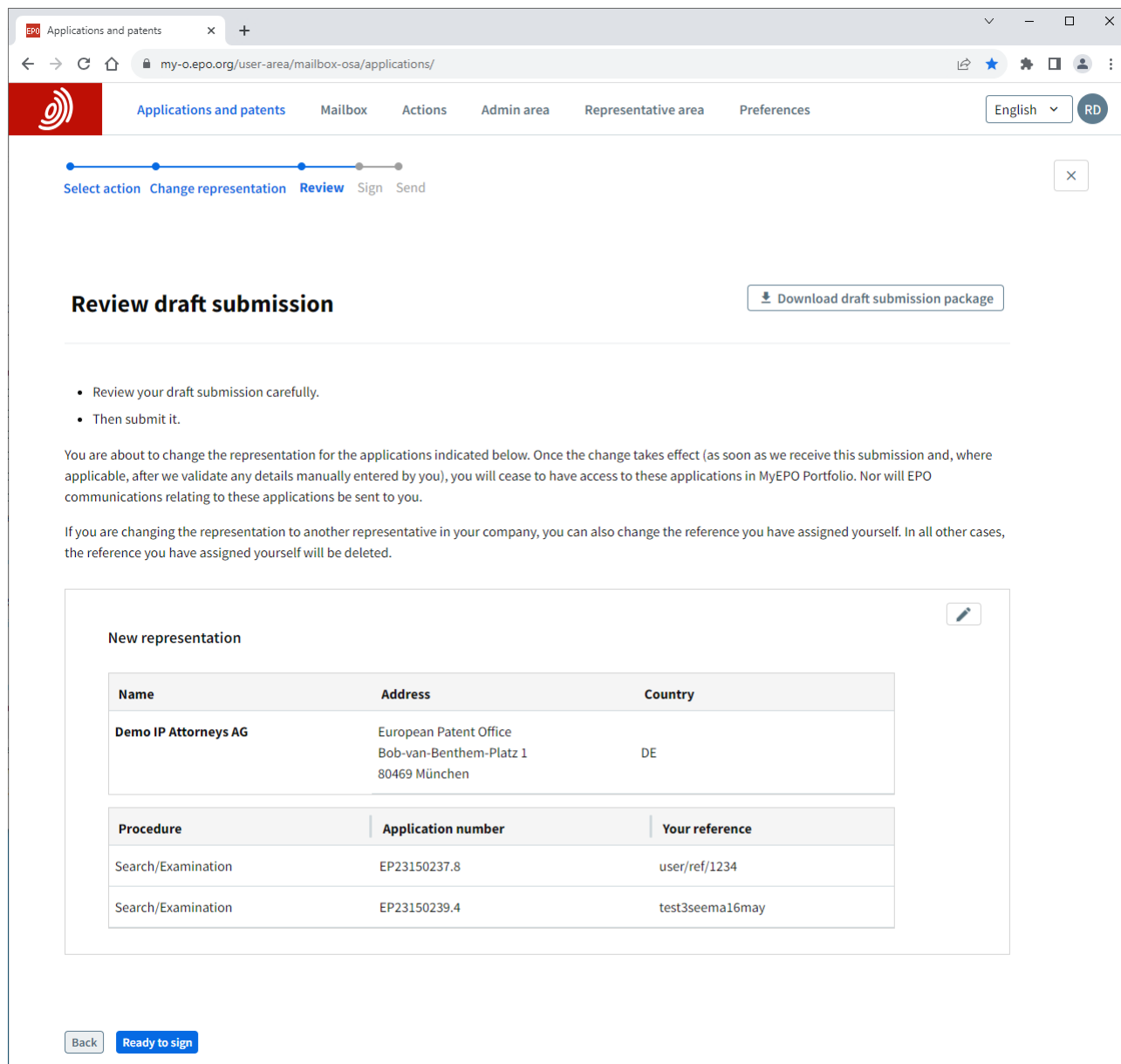


How do I draft and submit a request?

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 visible. The main content area is a table with columns: 'Signature', 'Function of person signing', 'Place', 'Date', and 'Remove'. The 'Signature' column contains a message: 'Add at least one signature.' Below this is a '+ Add signature' button. A modal window titled 'Add signature' is open, prompting the user to 'Enter the text string signature and any other information. Then select Add.' The modal contains three input fields: 'Function of person signing' (with a dropdown menu showing 'Representative, applicant ...'), 'Place of signing (optional)' (with a text input showing 'Place'), and 'Signature' (with a text input showing 'Signature'). A note below the signature field states: 'A forward slash ("/") will be added automatically at the start and at the end of the signature'. The modal has 'Cancel' and 'Add' buttons at the bottom right.

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.

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.

***Note:** In MyEPO Portfolio any user who has been granted permission by their company administrator to work on a given portfolio of applications can draft, review, and submit these requests, duly signed by the representative or association.*

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.

***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.*

The screenshot shows the 'Change representation or withdraw from representation' page in the MyEPO Portfolio. The page has a breadcrumb trail: 'Select action' > 'Change representation' > 'Review' > 'Sign' > 'Send'. The main heading is 'Change representation or withdraw from representation'. Below it, there are two radio button options: 'Change representation' (selected) and 'Withdraw from representation'. To the right, there is a table titled 'Selected applications / patents' showing two applications. The table has columns for 'Procedure', 'Application number', 'Publication number', and 'Your reference (editable)'. The first application is 'Search/Examination' with application number 'EP23150237.8' and reference 'user/ref/1234'. The second application is 'Search/Examination' with application number 'EP23150239.4' and reference 'test3seema16may'. Below the table, there are navigation buttons: '<<', '<', '1 of 1', '>', and '>>'. At the bottom right, there is a 'Next' button.

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

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.

Note: if you select applications in opposition phase, this option will not be available. Please make sure you select only EP applications in search/examination and/or Unitary Patents.

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 and examination steps.

You can, however, use MyEPO Portfolio to request changes to:

- 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.

EP15911827

my-o.epo.org/user-area/mailbox-osa/applications/biblio/?appnumber=EP15911827

Applications and patents Mailbox Actions 16 Admin area Representative area Preferences English RD

EP15911827.2

Your reference: SAH11362EP Applicant: Demo Manufacturing Co. GmbH

Documents Shared area Procedural actions 1 Due fees 2 New Requests

Progress bar: Edit bibliographic data Review Sign Send

Bibliographic data

The bibliographic data of the application are set out below.
You can request the correction of any erroneous or outdated information.

Title of invention

EN	demo
DE	Demo Test
FR	demo

Classification

H04N21/6405 H04N21/61

How to request changes to bibliographic data

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's formalities officers 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 decide not to pursue one or more applications that you have filed, you can use MyEPO Portfolio to request to withdraw them.

You can choose to:

- unconditionally withdraw the selected application(s), or
- withdraw them based on certain conditions. For example, on condition that some fees are refunded, or on condition that publication is prevented.

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.

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 'Applications and patents', 'Mailbox', 'Actions' (with a red badge showing '17'), 'Admin area', 'Representative area', and 'Preferences'. A language dropdown is set to 'English' and a user icon 'RD' is visible. Below the navigation bar is a progress bar with steps: 'Withdraw' (active), 'Review', 'Sign', and 'Send'. The main heading is 'Withdraw one or more European patent applications'. 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.' Below this, a red triangle icon precedes the text: 'Withdrawing a pending patent application has serious consequences. The application will lose all legal effect.' The section 'The selected applications are' shows two radio button options: 'unconditionally withdrawn' (selected) and 'withdrawn on condition that the withdrawal'. Under the second 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 present. At the bottom are 'Back' and 'Next' buttons.

How to request withdrawal of applications

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's formalities officers 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 that has been granted permission to access a portfolio can request these changes, duly signed by a representative.

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


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

Next

How to request transfer of rights

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.

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.

In both 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’s formalities officers 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.