Paying fees by credit card and claiming refunds online

Quick reference guide
Getting started

The EPO's credit card fee payment and refund claim service is available to registered users via a secure portal.

To access the portal, users should register with a username (email address) and password. Smart card authentication is not required.

To register, go to the EPO website: https://epo.org/fee-payment-service/.
Registering as a user

To pay fees by credit card or to claim refunds, you first need to register as a user. Please note that, as the email address given on registration will be your username, if you want to set up more than one user account, you will have to use a different email address for each one.

– On the EPO website, go to Pay fees and claim refunds and click Sign in to pay fees by credit card and claim refunds.
  The pay fees by credit card/claim refunds portal home page opens in a new browser tab.
– Click Register and fill in the information required (see screenshots below). Your email address will be your username for both services. Please note that the name of your company or organisation, your first name and your surname will be shown as payer information on your credit card payment confirmation and as submitter information on refund confirmations.
– Choose and confirm a password.
– Click Register.
– You will immediately receive an email confirming your registration.
  To activate your user account, please click the link in the email.

Register button
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Select your title</td>
</tr>
<tr>
<td>First name</td>
<td>Enter your first name</td>
</tr>
<tr>
<td>Surname</td>
<td>Enter your surname</td>
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<tr>
<td>Company/organisation</td>
<td>Enter your company/organisation information</td>
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<tr>
<td>Address</td>
<td>Enter your address</td>
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<td>Address line 2</td>
<td>Enter your address line 2</td>
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<tr>
<td>City</td>
<td>Enter your city</td>
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<td>Post code</td>
<td>Enter your post code</td>
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<tr>
<td>Country</td>
<td>Select your country</td>
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<td>Telephone number</td>
<td>Enter your telephone number</td>
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<td>E-mail address</td>
<td>Enter your e-mail address</td>
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<tr>
<td>Confirm e-mail address</td>
<td>Confirm your e-mail address</td>
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<tr>
<td>Password</td>
<td>Enter your password</td>
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<tr>
<td>Confirm password</td>
<td>Confirm your password</td>
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</tbody>
</table>
Sign in/resetting password

As soon as you have registered successfully, you are ready to start using the services in this portal.

- Enter your email address and password in the boxes shown and click Sign in.
- If you have forgotten your password, simply click Forgot your password? and enter your email address. You will then receive an email containing a link enabling you to reset your password. Please also check your spam folder in case the link has been routed there.
Managing your user account information

You can view and update your user account information online.

– Just click **My account** and select the information you want to view or update.

My account overview

Portal home page

The portal’s home page offers two options: **Pay fees by credit card** and **Claim refunds**.

You can reach this page from wherever you are in the portal simply by clicking **Home**.

The amount shown in the cart is the total amount of the fees you have selected so far. It does not relate to any refunds you may be claiming.
Paying fees by credit card

From the portal home page, click **Pay fees by credit card** to make fee payments for one or more applications. If you are paying fees for more than one application, you must select the fees separately for each one. However, you can then pay them as one single amount under **Check out** at the end of the selection procedure.

Please note that it is not possible to upload batch payment files for multiple applications. This option is only available for deposit account holders using the Online Fee Payment service.

There are four steps to making fee payments by credit card.
Step 1  *Provide information*

- Click **Pay fees**.
- Select the procedure: EP or PCT (UP currently unavailable).
- Enter the application number in the correct format in the field provided. *Tooltip will help you do this.*
- Enter the applicant's name and your personal reference (optional). *This information will appear in the payment confirmation.*
- Click **Continue**.

![Application form]

*Enter application data*
Step 2 Select fee group and fees

- Select all the fees you want to pay for the application concerned, by clicking Select from the relevant fee groups. Note: The service only displays the fee groups relevant to your type of application. This helps ensure that you choose the correct fee codes.

- Select any fee reductions or enter the number of fees to be paid (where relevant), and click Add to cart and continue. You can also edit the fee amounts manually by clicking Edit, making your changes, and then clicking Save. Note: The service does not automatically support certain functionalities that only apply to a small number of applications, for example indicating the states for which the designation fee has been paid in the case of applications filed or entering the European phase before 1 April 2009. In such cases, please edit the fee amount manually.

- If you would like to pay fees from multiple fee groups, click Add fees from another fee group.
Step 3 View cart

- Before you check out, view your shopping cart to see an overview of your payment for each application and make any amendments needed.
- If everything is correct, click **Check out** to complete your credit card payment.
- In this step you can still make any changes required. For example, you can edit your payment details, add or remove fee codes or applications, and edit fee amounts.
  Note: If you want to add or edit fees, the system will bring you back to step 2, where you can make the changes.
- If you want to pay fees for another application, click **Continue paying fees**.

![Cart](image)

**View cart before proceeding to checkout**
Step 4 **Check out**

- Select a saved credit card or provide your credit card information, and click **Confirm payment method**. If you enter new credit card information, you can save it for use with subsequent payments by ticking **Save payment info**.
  
  Note: Your credit card information is encrypted and the EPO will not store the full details. The same credit card can be used for multiple user accounts, and multiple credit cards can be allocated to a single user account.

- If everything is correct, click **I confirm the payment** under **Final review** to make your credit card payment to the EPO.

- You will receive confirmation that your payment was successful, together with a voucher number. You can print the confirmation page as proof of payment.
  
  Note: The payment confirmation is also available in your **Payment history** and is downloadable in PDF.

- If your payment was unsuccessful, a message will appear on your screen.
  
  Note: Credit card transactions can fail for a variety of reasons. If this happens, we recommend that you contact the bank that issued your credit card.

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*Enter payment information under checkout*
Carry out final review and confirm payment
Saving/deleting credit card information

You can save your credit card information for further payments if you wish. You can also delete saved credit card information.

- For information on how to save credit card information see step 4 - Check out - in the Making fee payments section of this guide.
- To delete a saved credit card, go to Payment details under My account and click the cross icon next to the credit card information. The system will ask you to confirm the deletion.

Delete credit card

Confirm deletion of credit card
Viewing payment history

The Payment history page gives you an overview of the credit card fee payments you have made.

– Click Payment history in the navigation bar to see the voucher number, date and total amount for each payment.
– To view and download payment details, click the PDF icon next to the voucher number.

You can sort the list by date or voucher number.
Claiming refunds online

Click **Claim refunds** on the portal home page.

There are three steps to claiming a refund.
Step 1 *Enter refund information*

- Select the procedure: EP or PCT (UP currently unavailable).
- Enter the application number* in the correct format in the field provided. 
  Tooltip will help you do this.
- Enter the refund code.*
  Tooltip will help you do this.
- Click **Continue**.

*The EPO issues two communications, which are dispatched separately by post. The first of these is the refund advice communication. This contains information about the pending refund (application number, fee code and amount). The second contains the refund code which you will need to identify and claim your refund. For security reasons, the second communication will not be visible in the public part of the electronic file, nor will it include any reference to the patent application concerned. The two communications are linked by the party’s reference on file and/or the filing date of the application.*
Step 2 Select refund method

- Select **Refund to deposit account held with the EPO** if the fees are to be credited to an existing deposit account.
- Select **Refund to a bank account** if the fees are to be refunded by bank transfer.

View refund summary and select refund method
Step 3a *Enter account details for refunds to an EPO deposit account*

- Enter your deposit account number.  
  Tooltip will help you do this.
- Click **Submit**.
Step 3b *Enter account details for refunds to a bank account within the SEPA area*

- Select previously saved bank account details OR provide (new) account details, and click **Submit**. If you enter new account details, you can save them for use with subsequent refund claims by ticking **Save account details**.
- Enter country of account.
  Note that for accounts held within the Single European Payments Area (SEPA) (AT BE BG CH CY CZ DE DK EE ES FI FR GB GR HR HU IE IS IT LI LT LU LV MC MT NL NO PL PT RO SE SI SK SM), it is sufficient to provide the IBAN and the name of the bank account holder.
- Enter name of account holder.
- Enter IBAN.
  Note that no spaces are allowed in the IBAN.
- Save account details (optional).
- Click **Submit**.

![Bank account details form](image)

*Enter details for a bank account held in a SEPA country*
Step 3c: Enter account details for refunds to a bank account outside the SEPA area

- Select previously saved account details OR provide new account details and click Submit. If you enter new account details, you can save them for use with subsequent refund claims by ticking Save account details.
- Enter country of account. Note that for accounts held outside the SEPA area it is sufficient to provide the name of the bank account holder.
- Enter name of account holder.
- Enter bank account number.
- Enter BIC/SWIFT. Note: The system will only accept the BIC/SWIFT of your bank’s main branch, which may differ from that of your particular branch. This main branch BIC SWIFT usually ends with the three characters “XXX”. If your BIC/SWIFT is not accepted, please contact our Customer Services (www.epo.org/contact).
- Save account details (optional).
- Click Submit.
Enter details for a bank account held in a country outside the SEPA area

<table>
<thead>
<tr>
<th>Refund summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fees to be refunded:</td>
</tr>
<tr>
<td>Application number</td>
</tr>
<tr>
<td>Refunded fee codes</td>
</tr>
<tr>
<td>Reference</td>
</tr>
<tr>
<td>Total amount</td>
</tr>
</tbody>
</table>

Enter your bank account details:

- **Use existing account details**
- **Country of account:** Japan
- **Name of account holder:** M Musterman
- **Bank account number:**
- **BIC/SWIFT:**

- **Save account details**

Submit

I confirm the above information is correct and wish to submit this refund claim.
Confirmation of the refund is displayed on the screen.

Confirmation of refund
Viewing refund history

The **Refund history** page gives you an overview of the refund claims you have successfully submitted.

- Click **Refunds -> Refund history** in the navigation bar to see the voucher number, date and total amount for each refund.
- To view details of a particular refund, click the voucher number.

You can sort the list by date, voucher number, application number or reference number.
Need more help?

Visit www.epo.org/contact for

- FAQs and discussion forums
- Contact forms
- Customer Services phone number

Useful links

www.epo.org/online-services
www.epo.org/fee-payment