Interactions with the EPO (Overview)
Related To The use of Our electronic Services

EPO User Day - The Hague
- Smart Card related Actions
- Filing Interactions: Advantages of an Association v Representatives
- CMS Registration
- OLF Tips
- Quality and OLF / CMS / WFF Comparison
Smart Card Registration

- When you register or renew a smart card:
  https://nrm2.epoline.org/myepoline/pcf/scEnrolment.html?siteLanguage=en

- You create or join a company portal based on the company name!

- This is currently only for the MBX / MyFiles / OLFP Portal not CMS

- Check the correct company name with your company Administrator. (Otherwise you may find yourself in a different company portal)

- No P.O Box number accepted
Enrol for a smart card

### Company details

<table>
<thead>
<tr>
<th>Company name:*</th>
<th>EPO Berlin</th>
</tr>
</thead>
<tbody>
<tr>
<td>City:*</td>
<td>Berlin</td>
</tr>
<tr>
<td>Country:*</td>
<td>Germany</td>
</tr>
</tbody>
</table>

The company name will appear on your smart card. You should therefore enter the official version of your company name as used on your patent applications. If you do not have a company name, enter your first name and last name, e.g.: John Smith. Avoid BLOCK CAPITALS unless this is a distinguishing element of the name. Example: European Patent Office and not EUROPEAN PATENT OFFICE. Note: It is important that everyone in your company has the same version of the company name on their smart card.
## Multiple Portals

<table>
<thead>
<tr>
<th>Company Name</th>
<th>City</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>EPO</td>
<td>Den Haag</td>
<td>Netherlands</td>
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<tr>
<td>EPO, Den Haag &amp; Brno</td>
<td>Rijswijk</td>
<td>Netherlands</td>
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<tr>
<td>EPO Berlin</td>
<td>Berlin</td>
<td>Germany</td>
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<tr>
<td>EPO BERLIN</td>
<td>Berlin</td>
<td>Germany</td>
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<tr>
<td>EPO Demo1</td>
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<tr>
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<td>Rijswijk (ZH)</td>
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<td>Rijswijk (ZH)</td>
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<tr>
<td>EPO Demo7</td>
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<td>EPO Munich</td>
<td>München</td>
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<td>Rijswijk</td>
<td>Netherlands</td>
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<td>EPO TEST</td>
<td>Nordhiro</td>
<td>Netherlands</td>
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<tr>
<td>EPO The Hague</td>
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<td>EPO Training Munich</td>
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<td>EPO User Support</td>
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<tr>
<td>EPO Vienna</td>
<td>Vienna</td>
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### Clients

<table>
<thead>
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<th>User Id</th>
<th>Last Name</th>
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</tr>
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<td>Michael</td>
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<td>47617</td>
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<td>4377</td>
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<td>e</td>
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<tr>
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<td>4374</td>
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</table>

### Company Name: EPO Berlin

- **Country:** Germany
- **City:** Berlin

### Company Name: EPO BERLIN

- **Country:** Germany
- **City:** Berlin

<table>
<thead>
<tr>
<th>Epoline Id</th>
<th>User Id</th>
<th>Last Name</th>
<th>First Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>47622</td>
<td></td>
<td>Lindblom-Dublin</td>
<td>Michael</td>
</tr>
</tbody>
</table>
Smart card Related actions

If Somebody leaves the company

- Smart Cards are now issued carrying only the name of the individual, meaning that an individual can take the smart card with them and use it at their next company!

- However, even if you destroy the smart card, when they apply for a new one at their new company, certain links remain, such as to the files for which they are still the first representative at their old company.

- What are the related consequences or actions to be taken in this case?
Individual Responsibilities: Representative leaving

- If FREP takes smart card: He / She should send an e-mail to support@epo.org to change the company to which the smart card is linked (manually updated at EPO). This puts the smart card in the correct “new” company portal and removes it from the user list at the old company.

- FREP should also inform support@epo.org to change the deposit account linked to the smart card to the correct one from the new company, so that they can view the correct account in future.
Individual Responsibilities: Representative leaving

- Should still inform DG5 of the relevant change of business address, although we have a link between departments, due to the flexibility of the representatives role, we do not automatically reallocate files or change the smart card details without specific instructions.

- **Should reallocate files** for which they are no longer the representative before they leave the company. Communications are sent electronically to the FREP on file, this action would avoid them receiving official EPO communications that should not be sent to them at their next company and stop them having access to files that they no longer represent, via their smart card & MyFiles.
Individual Responsibilities: Non - Representative leaving

- If USER takes smart card: they should send an e-mail to support@epo.org to change the company to which the smart card is linked (manually updated at EPO). This puts the smart card in the correct “new” company portal and removes it from the user list at the old company.

- USER should also inform support@epo.org to change the deposit account linked to the smart card (if relevant) to the correct one from the new company, so that they can view the correct account in future.
The Company Administrator (employee leaving)

- IF FREP is leaving: make sure that all relevant files for this individual have been reallocated, using MyFiles if you are Mailbox users, or via KAM, or fax to Eric Bihl, Claudia Weber 00498923994465
- Any smart card holder: remove user access rights (Online Fee Payment, Mailbox, Administrator)
- Any smart card holder: Contact support@epo.org (with the person leaving) to ensure the smart card (being taken) has been updated to the correct company. If smart card has been destroyed ask support@epo.org to remove the owner from your users list.
- Check that the correct DEPA is linked to users card
- Keep list of EPO online services Administrators up to date so that they receive important information from EPO
The Company Administrator (employee Joining)

- IF FREP is joining: make sure that all relevant files for this individual have been reallocated, using MyFiles if you are Mailbox users, so that they are no longer named on cases from the previous company......otherwise you receive mail from their previous company, in your Mailbox

- Check that smart cards are registered with the correct portal, so that the “users” can be viewed and managed by you.

- Check that access for OLFP / MBX / MyFiles is working

- Check that the correct deposit account is linked to the smart card.
Administrator generally managing portal...reminder

- If users are there who should not be; e-mail support@epo.org

- If users are not there who should be; e-mail support@epo.org Why?

- When you register for a smart card you create a portal, any colleagues who register for the same company & location will be added automatically to it!

- If your colleague gives a variation on company name or location it creates a new portal & the Administrator will not see them under Users, our support team can add them to the correct portal.
Filing Interactions (reducing administrative work & errors)

After passing the EQE:

- A representative is given a Professional representative (FREP) Number which remains as your unique identifier.

- We give you sub-numbers if you move companies in your career, this interaction is through DG5 (legal department) & CDR (client data registration). This is linked to your physical address.
Filing as a Representative....did you know?

- When you file as a representative the EPO links FREP to file using the sub number in CDS
EPO codes individual in database

Acting Representative for APPR: Appleyard Lees, 15 Clare Road, Halifax HX1 2HY, UNITED KINGDOM (101348097)

Representative address (FREP02CDS):
Bray, Richard Anthony
Appleyard Lees
15 Clare Road
Halifax HX1 2HY
UNITED KINGDOM

Receipt of appointment (FREPA2): 04-07-2013
Receipt of authorisation (FREP03): 04-07-2013

= Historically (paper) communications sent to physical address
= Currently EPO (e-) communications sent to individual FREP
Filing as a Representative (related points)

- In the current e-world therefore, when a FREP leaves FILES MUST BE REALLOCATED IMMEDIATELY to avoid related communications being sent to the named Frep at the new company (MBX).

- This also means that when an attorney joins your company you must check whether or not all of the files at their previous company have been transferred.

- It also means that if you are reorganising files internally you should also inform the EPO of a change of representation.

- How can I avoid this extra work?
Do You know what an association is under

- Under [Rule 152(11) EPC](https://example.com), "The authorisation of an association of representatives shall be deemed to be an authorisation of any representative who can provide evidence that he practises within that association"

- An association consists of at least two professional representatives. In decision J 08/10 dated 5 October 2011, the Legal Board of Appeal ruled that a legal practitioner cannot be treated as a member of an association of representatives
How to Become an Association

Filing as an Association....did you know?

When you file as an Association the EPO links the company to the file.
EPO codes company in database

Historically (paper) communications sent to physical address
Currently EPO (e-) communications sent to company ASSOC
Filing as an Association.....Therefore means

- You no longer need to inform EPO of FREP changes
- Replaces additional representatives list.
- All existing files could be transferred to the Association with one sentence, faxed (currently) to the Attention of Eric Bihl / Claudia Weber at 00498923994465.
- If required, an acting Association can have multiple addresses, ie one company with multiple locations wants the administration centralised but the address of service on the letters to reflect the office dealing with them.
How not to file (If association route interests you)
Applicants

- Applicants filing only as applicants can currently not use mailbox / MyFiles
Potential Solution for Applicants

- If applicants have in house attorneys and they file as representatives or as an association on behalf of the applicant then a Mailbox could be set up, as we can link the applicants files to the unique identifiers of the representatives or association acting on their behalf, even if technically they are employees.

- This mirrors the same situation as professional representatives working in private practice?
Applicants Transfer of files to Individual representatives / or an Association

Transferring the files from the applicant to the in-house individual representatives or association can be done in co-operation with our CDR experts & your KAM.

An example of such a request to transfer to representatives

We, the undersigned ????? Technology Ltd. hereby kindly request the European Patent Office to transfer all cases to the following Representatives for ????? Technology Ltd.
Furthermore, we kindly request to also transfer the cases without representation & or a PADR, i.e. where we have signed as employees under Art 133 to ????? Technology Ltd
Communication

- Be Aware of how you communicate with the EPO

- Be aware of why you communicate in that way

- Because future developments at the EPO envisage giving you ownership of your data.

- self-service options (MyFiles)
New Online Filing CMS

- http://www.epo.org/applying/online-services/new-online-filing/features.html

- EP Form 1001 (EP direct)
- EP Form 1200 (Euro-PCT)
- PCT/RO/101
- EP Form 1038 (subsequent actions for all EP and PCT procedures, including PCT Chapter II demand and notice of opposition (PDF only).
- It is currently not for filing documents in respect of, PCT applications to WIPO or filings to National Offices.
CMS Registration

Your full name (as indicated on EPO smart card)*

Number indicated on your EPO smart card*

e-mail address*

Telephone number*

Do you work for a company or law firm?*

Yes

Company name / law firm (as listed by the chamber of commerce)*

Company / law firm’s principal place of business (city/country)

Name of company / law firm’s EPO key account manager, where applicable

If your company / law firm already has access to the new online filing (CMS):

Company / law firm’s name (as indicated in the new online filing (CMS))

Company / law firm’s organisation administrator (1) (fill in your name or a colleague’s name)

(1) The person(s) responsible for managing the CMS users within an organisation (preferably the administrator of EPO online services).
CMS Account Management

- Make sure that you set up your organisation / company structure correctly.

- Do you want one CMS for your entire company, or;

- Do you want one CMS per location (for example)

- If you are not sure whether somebody else in your organisation is using CMS check with support@epo.org first
Online Filing Tips

- Filing 1038,,,,, do not use annotations for urgent Withdrawals
- By attaching a letter to OLF, the document type you choose creates an urgent message to the EPO.
Online Filing Tips

- Do not use department for Applicant unless you want it published
Online Filing Tips

- Using 1038 for batch requests (such as file transfers) will potentially delay the related actions at EPO.

- The letter will be put into the application only relating to the lead number in the 1038.

- It then needs to be identified by the F.O opening the message and sent to CDR mailbox, if it is not identified as a batch request it will go to the back of the queue.

- Quicker to fax CDR batch requests to 00498923994465, attention Claudia Weber & Eric Bihl.
Online Filing Tips

- PPH Requests

- With reference to the EPO notices outlining the PPH participation conditions and requirements participation in the PPH programme can only be requested by using the specific form (EPO 1009 PPH). Requests filed informally, i.e. without using the form mentioned above, should not be accepted/processed.

- Regarding the last three boxes of EPO form 1009, i.e. place and date of the request, name of signatory, signature of applicant/representative, these do not have to be filled, if the applicant is using epoline services for the submission of documents as an electronic signature is generated by means of epoline Smartcard.
Quality & Comparison Document

FAQs
http://www.epo.org/service-support/faq.html

Customer services feedback
https://forms.epo.org/service-support/contact-us/feedback-form.html

Formal complaint
https://forms.epo.org/service-support/contact-us/formalcomplaint-form.html

Comparison Table
Questions?

- Contact:
  - Support@epo.org
  - Call Customer Services 00 800 80 20 20 20

(Monday to Friday, 08.00-18.00 hrs CET)