



**DELTA PATENTS**

Training for Patent Professionals

# **EPAC PREPARATION**

**13 HALF DAY SESSIONS**

**EPC PROCEDURES**

**&**

**PCT PROCEDURES**



# DELTAPATENTS WELCOMES YOU

## Why DeltaPatents?

DeltaPatents is a **patent attorney firm** based in the Netherlands with a passion for quality. The firm was founded in 2001 in Eindhoven, one of Europe's leading technology cities. We provide the highest quality advice and service to public and private companies at various stages of growths from start-up to Fortune 500. All our patent specialists have a deep technological knowledge and extensive industrial experience at companies like Philips, NXP, ASML, AstraZeneca and Shell.

Our client's needs vary when it comes to patenting routes and level of support needed, and we are able to adapt to their needs and work together with local in-house support staff. This gives us a wide range of knowledge over a broad spectrum of patent procedures.

We are proud to be a leading training organisation for Patent Attorneys for over a decade, offering a complete range of training modules for the European Qualifying Examination – EPC and PCT, and various other IP subjects.

*"It was a pleasure to study with such a skilled and nice instructor"*

Unique for DeltaPatents is that we thoroughly train and guide our tutors. For our tutors, training is a profession, mastered by teamwork and frequent involvement in courses. We take feedback of attendants seriously and act on it. For us, quality and customer satisfaction are essential.

Our **blogs** keep you up-to-date on the EQE, Case law, Patent procedures, Unitary Patent and Dutch IP News.



In 2006 we started training IP support staff, culminating in a full training program preparing for the official Dutch Formalities Officers exam. The program is audited by the Dutch Platform Formalities Officers. The training modules are now offered throughout Europe.

Our training focuses on giving insight and understanding, and ensuring that the acquired knowledge can be practically applied, using flow charts, official forms and examples of correspondence from the Patent Offices. Our explanations follow the natural course of applications to be consistent with the daily practice of IP Administrators (Formalities Officers).

*"Education is not the learning of facts,  
but the training of the mind to think"*  
**Albert Einstein**

Through our education activities, we stay ahead in terms of law changes, case law and procedural requirements.

## DeltaPatents' personal touch

We believe in teaching and treating candidates with a personal touch. You will be trained in small groups, giving ample opportunity to discuss unclear issues in more detail and get personal assistance.

Hospitality is important to us. For candidates staying in Eindhoven for a couple of days, we always organize a social event, such as a dinner or a trip to a local place of interest.

We welcome email contact with our tutors to ask follow-up questions, to clarify course materials or to report mistakes.



# EPAC PREPARATION

## 13 HALF DAY SESSIONS ON EPC AND PCT PROCEDURES

### Objective

The EPO has developed a new certification: the European patent administration certification (EPAC). Designed for paralegals, patent administrators and formalities officers, the EPAC will equip professionals with the knowledge and skills to manage filing, prosecution, grant and maintenance associated processes for European and international patent applications before the EPO. The first exam was on 12 December 2022. The date for the 2023 exam has not been published yet. For details, please refer to <https://www.epo.org/learning/european-patent-administration-certification.html>.

This course, provided by DeltaPatents Training, prepares candidates for the EPAC 2023 exam; it covers the EPAC syllabus. For many years, DeltaPatents has been offering a similar course to candidates preparing for the national formalities exam in the Netherlands. We are therefore able to provide a well-established course to prepare for EPAC 2023. The course is designed for and directed to paralegals, patent administrators and formalities officers. The course will consist of a series of 13 half-day online sessions, with interactive presentations and homework by which candidates can further develop their knowledge, understanding and skill. Candidates will need to have sufficient time available to make the homework to benefit optimally from the course. The course will start in April since we think that candidates need to have enough time to prepare for this exam. By

using half-day sessions, the amount of new information per session is kept at a manageable level. By using an online format, participants can take part from all over Europe - or even outside. During the course candidates will use **WISEflow** (exam system used by the EPO) for practicing exam questions, which gives them a big advantage at the exam.

### Structure and approach

Our focus is to create insight and a thorough understanding of the several procedures. We not only explain what actions should be taken and when, but more importantly why they should be done and how. Our explanations follow the natural course of applications from filing to national entry, so as to be consistent with the daily practice of IP Administrators. Additionally, issues during the preparation for filing and after regional/national entry are covered.

The information is communicated to participants by presentations using an extensive set of slides. To stay close to daily practice, for EPC we use official forms and examples of correspondence from the EPO to clarify the procedures. For PCT we use the forms and official letters of the Receiving Office, ISA, IPEA, etc. in a format that follows an application from filing to entry into the regional/national phase. Furthermore we provide a unique set of flowcharts developed by ourselves that explain the various procedures visually. Most presentations end with a few short exercises and cases to wrap up the topic.



## Who should attend?

Everyone who would like to sit the EPAC exam in 2023.

## Contents of the EPC part (8 sessions)

The sessions cover the general aspects of patents and the core procedures of the EPC (European Patent Convention) from filing to grant. During this course we focus on explaining some general issues like inventor-/ownership issues, representation before the Patent Offices, the priority system, and the core EPC procedure for filing, examination on filing and the formal requirements. Furthermore we deal with publication, search, substantive examination, grant and national validation. Recent or upcoming changes in the EPC are also explained.

## Topics included:

### General Aspects Patents

- Ownership (inventor vs. applicant)
- Representation before Patent Offices
- Patent routes and systems (national, regional, international)
- Priority concept

### Information on the EPC

- Relevant sources of information

### EPC Time limits

- Types of periods/time limits, triggers
- Notification, 10-day rule
- Calculation of time limits
- Extension of office time limits

### EPC Remedy system

- Correction of errors
- "Loss of rights" communication
- Further processing
  - Requirements, exclusions
- Re-establishment of rights
  - Requirements, exclusions
  - Cause of non-compliance, all due care
- Appeal

### EPC Filing the patent application

- Where to file
- Filing at national authority
- How to file at the EPO (fax, online)

### EPC Filing date requirements and examination

- Filing date: requirements or reference to an previously filed application
- Legal effect of filing date
- Filing date: examination, accordance of date
  - Indication that European patent is sought
  - Identification of applicant, contact information
  - Description
- Missing parts

### EPC Formal requirements and examination

- Formal requirements, examination and remedies, illustrated by the online filing of the EP Request for grant form 1001:
  - Content of the application
    - Description, claims, abstract, drawings
    - Presentation application documents, physical requirements
    - Sequence listings
    - Language / translation
  - Request-for-Grant
    - Designation of the inventor
    - Priority claim
    - Representation
  - Filing fee, search fee, claim fees
- Requirements for further documents

### EPC Divisional application

- What is a divisional
- Filing a divisional application
  - Where to file
  - Until when to file: 'pending',
  - Language of the divisional application
  - Fees: filing fee, search fee, claims fees, designation fee, renewal fees

### EPC Search and search report

- When is the search expected
- Contents of the Extended European Search Report, documents found in search
- Invitations to pay additional search fee (lack of unity), to indicate independent claims/subject-matter to be searched
- Transmittal of search report, incomplete search
- Amendments allowed after receiving search report
- Acceleration of the search
- Invitation to respond to search opinion

### Unitary Patent procedure

### EPC Publication of the patent application

- When published?
- Contents and form publication, publication server
- European Patent Register
- Types of publications
- Preventing publication, withdrawal application, technical preparations

### EPC Request for examination and substantive examination

- Requesting examination, paying the examination fee
- Paying the designation fee
- Response to search opinion
- Substantive examination – office actions, response to office actions, amendments
- Oral proceedings, telephone interview
- Decisions:
  - Refusal
  - Intention to grant, fees, translation of claims, late amendments
  - Decision to grant, mention of the grant, publication
- National validation, London Agreement

### EPC Fees

- General structure
- Fees for applications
- Calculation renewal fees
  - European patent applications, divisional applications
- Rules relating to fees
  - refund of fees
- Payment:
  - deposit account
  - automatic debiting
  - bank transfer, credit card

## Contents of the PCT part (5 sessions)

These sessions cover the core procedures of the PCT (Patent Cooperation Treaty) and regional entry in EP.

## Topics included:

### Information on the PCT

- Relevant sources of information
- Overview of online databases and services

### PCT Introduction

- PCT background & advantages
- Patenting routes
- Structure of the PCT
- PCT Chapter I and Chapter II
- International phase / National phase
- Offices and their roles (International Bureau, Receiving Office, ISA, IPEA etc.)
- Priority, restoration of the right to priority
- Agents and common representatives

### PCT Time limits

- Types of periods/time limits, triggers
- Notification
- Calculation of time limits
- 'Considered in time'
- Extension of time limits

### PCT Remedy system

- Overview of remedies
- Invitations
- Delays in applicant/office receiving post
- Correction of obvious mistakes
- Review and excuse procedure

### Filing the international application

- What to file and pay
- Where to file the international application, the receiving Office
- Form RO/101
- Designation of the applicant, the inventor
- Signature, agent
- Languages and translations
- Reference to earlier search
- Fees
- Priority claim

### Filing date requirements and examination

- Filing date: requirements
- Legal effect of filing date
- Filing date: examination, accordance of date
- Corrections in filing date requirements
- Missing elements and parts - General

### Formal requirements and examination

- Formal requirements, examination and remedies
  - Content of the application
  - Request form RO/101
  - Filing fee, transmittal fee, search fee
- Requirements for further documents

### International search

- International Search, competent International Searching Authority [ISA]
- Search fees and refund
- Special procedures:
  - Lack of unity
  - No meaningful search
- PCT Direct
- International Search Report [ISR], written opinion of ISA
- Amendment of the claims after receipt of ISR
- Supplementary International Search (SIS)

### International publication

- Background of publication
- When published?
- Contents and form publication, access to files
- Languages of publication
- Preventing publication, withdrawal application, technical preparations
- Third party observations

### International preliminary examination

- International preliminary examination
  - Filing demand + fee payment
  - Competent IPEA
  - Written opinion of IPEA
  - IPER = IPRP (Chapter II)
- EPO as IPEA
  - When to file amendments?

### PCT Fees

- General structure
- Fees for applications
- Amount and currency
- To which authority must fees be paid
- How to pay
- Main differences compared to EPC

### National phase – general

- End of PCT Chapter I
  - IPRP (Chapter I)
- Acts for entry into national phase:
  - time limit for entry
  - translation international application
  - fee payment
  - naming of inventor
  - priority documents
  - representation
  - amendment before dO/eO

### Regional entry EP

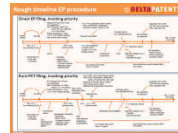
- Euro-PCT – EPO as dO/eO
- Acts for entry into EP regional phase, e.g.
  - Amendments, fees
  - Supplementary European search
  - Substantive examination
  - Renewal fees
  - Claims fees
- Application deemed withdrawn
- Form 1200 - EP entry into the regional phase

## Training material

A comprehensive set of high quality, up-to-date training materials will be provided including:



The **set of slides** used during the presentations.



**Flowcharts** that visually explain the various procedures, summarize the steps to be taken and show parts of official letters of the Patent Offices

### To practice for the exam:



**Cases and questions** (open and multiple choice) and **'Life of a file'** to assist participants in internalising the information.



Learn how to work with WISEflow, the system for the EPAC exam.





## Online training

The course will be given online, we will use WebEx for the training. The sessions will be recorded and the recordings will become available for the participants until the date of the exam.

## Course schedule:

The course contains 13 half day sessions (9.00 – 12.30 hrs.), on Tuesdays and Thursdays:

- Session 1: Wednesday 19 April 2023 – EPC
- Session 2: Thursday 20 April 2023 – EPC
- Session 3: Tuesday 9 May 2023 – EPC
- Session 4: Thursday 11 May 2023 – EPC
- Session 5: Tuesday 23 May 2023 – EPC
- Session 6: Thursday 25 May 2023 – EPC
- Session 7: Tuesday 13 June 2023 – EPC
- Session 8: Thursday 15 June 2023 – EPC
- Session 9: Thursday 31 August 2023 – PCT
- Session 10: Tuesday 5 September 2023 – PCT
- Session 11: Thursday 7 September 2023 – PCT
- Session 12: Tuesday 19 September 2023 – PCT
- Session 13: Thursday 21 September 2023 – PCT

## Course language

The material will be provided in English. Tuition will be in English.

## Certificate

Each participant will be given a certificate of attendance.

## Registration

The price of this online course is € **2.600**. Prices include tuition, course materials, shipment and recordings.

A registration fee of € 65 is charged for each booking. For a company booking of several courses at the same time, only one administrative fee of € 65 will be charged. All prices are exclusive of VAT (currently 21%).

Please use the enclosed registration form to enrol and send it to us by email or fax. You may also register online: [www.deltapatents.com](http://www.deltapatents.com).

## Cancellation policy

Please check our website ([www.deltapatents.com](http://www.deltapatents.com)) for our cancellation policy.





**“I’M VERY HAPPY  
WITH THE  
FLOW-CHARTS!”**





**Jelle Hoekstra**



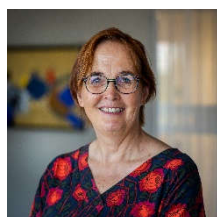
**Tanja la Cour**



**Diane Tweedlie**

## Meet the Tutors

- **Jelle Hoekstra** is a founding partner of DeltaPatents, and an experienced tutor. He has been involved with Intellectual Property for more than 20 years in industry and private practice. He is a European Patent Attorney and author of several books on the EPC.
- **Tanja la Cour** is tutor for Main Exam Paper C and IP Administrators' courses. She is a European Patent Attorney in the field of Life Science and Biotechnology and Manager IP Support.
- **Diane Tweedlie** is tutor for Pre-Exam, Main Exam Paper D and IP Administrators' courses. She is a European Patent Attorney in the field of Mechanical Engineering.



**Mieke Zonjee**

## Contact

**For more information** please visit the DeltaPatents website ([www.deltapatents.com](http://www.deltapatents.com)) or contact Mieke Zonjee at DeltaPatents ([training@deltapatents.com](mailto:training@deltapatents.com)).



# REGISTRATION FORM

You may register by **fax** + 31 40 2366708 **mail** DeltaPatents Training B.V., Fellenoord 370, 5611 ZL Eindhoven, the Netherlands  
**website** [www.deltapatents.com](http://www.deltapatents.com) **e-mail** [training@deltapatents.com](mailto:training@deltapatents.com)

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name

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company

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address

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billing-address (if different)

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billing e-mail or phone

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purchase order

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VAT-number

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tel. no.

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e-mail address

A registration fee of € 65 is charged for each booking. If more than one course is booked at the same time, only one administrative fee of € 65 will be charged. All prices are exclusive of 21% VAT. No VAT will be charged if a VAT-number is provided on this form.

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EPAC ☐ Online training: April – September 2023  
Preparation

Price € 2.600

Cancellation policy: please check our website ([www.deltapatents.com](http://www.deltapatents.com)) for our cancellation policy.