



Presented by  
Management Forum

# Annual Conference for Senior Patent Administrators

26-27 September 2024

This prestigious 'must-attend' event has been designed specifically for senior patent administrators. It provides an ideal opportunity to learn about developments that affect you and your role, to make sure you are up to date on best-practice and are working as efficiently as possible.



**Format:**  
Classroom



**CPD:**  
9 hours for your records



Certificate of  
completion

# Course overview

**Newly updated outline programme now available** – including the new Unitary Patent (UP) and the Unified Patent Court (UPC) which came into full force in June 2023.

The event is very participative, providing plenty of time for open questions and round table discussions with the experts. To maximise the benefit from attending this event, please bring your questions along so you can get the answers and solutions you need.

Attending this event is also a chance to learn more about procedural issues and the practical aspects of the EPO, WIPO and USPTO, and how the Unitary Patent Court coming into operation impacts you.

At the end of day one you are invited to a drinks reception where you will have the opportunity to network with other delegates, and share your experiences and views on important patent formalities issues.

## Why this conference is important for you

- The programme is designed exclusively for you and your colleagues, not for lawyers and attorneys
- In just one event, you will hear information about:
  - the EPO, WIPO and USPTO
  - latest tips and best practices
  - projected changes for the next year so you're ahead of the game
  - latest developments of the UP and UPC and its impact to date
- The expert speakers have first-hand practical experience and knowledge of their areas which they will share with you

## A unique networking opportunity

By talking to other delegates you will be able to:

- share your experiences
- find the answers to your questions
- take home solutions to your problems
- build contacts through networking

As a result you will:

- have the most up to date information to enable you to excel in your role
- get to grips with best practice and procedures
- be able to work more efficiently and effectively
- avoid mistakes, saving time and money

## Who should attend?

This annual event has been specially designed for:

- Senior patent administrators
- Formalities officers
- IPR and legal assistants
- Paralegals
- Delegates from previous years' conferences looking for the latest information from leading experts
- Everyone who wants to hear about the latest updates, exchange views and ask questions about important patent formalities issues

## Benefits of attending

By attending this event you will learn about:

- **EPO and European patent formalities**
  - A review of the changes to the European patent grant procedure that have entered into force in recent years, including:
    - New PPH partner offices
    - Developments with respect to the electronic filing of documents
    - Fee changes
    - 10 day rule changes
- **The Unitary Patent**
  - Practicalities and benefits of filing
  - How to obtain a UP
  - Re-establishment of rights and renewals
- **PCT update and best practices**
  - Recent PCT Rule and other practice changes
  - Effective use of ePCT for filing and post-filing
  - Best practices for the international and the national phase
- **US update and best practice**
  - US application filing options
  - Surcharge for non-DocX application filings
  - PCT national phase in the US
  - Continuation, Divisional, Continuation-in-Part

# Programme

## Day 1

### Introduction from the Chair

- Welcome to the event
- Introduction to the speakers and topics to be covered

### European formalities update

- A review of the changes to the European patent grant procedure which have entered into force since autumn 2018, including:
  - New PPH partner offices
  - Developments with respect to the electronic filing of documents
  - Fee changes
  - 10 day rule changes
- Both major and minor changes will be covered, with an assessment of their impact on patent administrators' daily practice
- Outlook to upcoming changes: any procedural changes that were decided upon which came into force in the course of 2023/4 will be presented.

### European formalities update - The Unitary Patent

- Benefits of filing a Unitary Patent (UP)
- How to obtain a UP - filing of the application: form 7000
- Request for unitary effect and related deadlines
- Re-establishment of rights
- Renewal fees for UPs
- Other filing documents, fees and timescales

### European formalities round table

- An opportunity to share your experiences with the speakers and to discuss approaches and solutions for dealing with the EPO system

### PCT update and best practices

- Recent PCT Rule changes and other practice changes
- Effective use of ePCT for filing and post-filing
- Best practices for the international phase

### Effective nationalisation of your PCT application

- Best practices for the national phase

### PCT question and answer session

- An opportunity to ask the speaker questions and to discuss approaches and solutions for dealing with PCT

## Day 2

### US update and best practice

- USPTO in early planning for fee changes in 2025

### US update and best practice continued

- US Application Filing Options
  - Surcharge for non-DocX application filings
  - PCT National Phase in the US
  - Continuation, Divisional, Continuation-in-Part

# Presenters



## Catherine Van Houten

Catherine Van Houten has over 30 years' experience in United States patent prosecution support and administration. She is currently Practice Manager with McNeill Baur PLLC. She has over 30 years of IP support experience, including 18 years in management roles with increasing levels of responsibility. Well-recognized for her knowledge and leadership ability, Cathy speaks and teaches frequently on patent firm administration. She was previously IP Administrator with Venable LLP, working in the firm's Washington DC office. A significant portion of Cathy's career in intellectual property was spent with Finnegan Henderson Farabow Garrett & Dunner, LLP, most recently as Manager of Docketing and Intellectual Property Training. She frequently runs courses for patent assistants and attorneys on various aspects of United States patent formalities. She also participates in US Patent and Trademark Office Focus Groups and meetings on Electronic Filings and e-commerce. She holds a Bachelors Degree in Business Administration from the University of Maryland.



## Matthias Reischle

Matthias Reischle, a national of Germany, is Deputy Director of the PCT Legal Division of the World Intellectual Property Organisation (WIPO). Matthias holds a law degree from the University of Constance, Germany (1993) and a LL.M. in European Legal Studies from the College of Europe, Belgium (1994). After qualifying to practice law in Germany in 1996, he worked as a legal adviser for the International Labour Organization in Geneva. Since joining the staff of the PCT Legal Division in 1998, he has participated in the drafting and implementation of various amendments to the Regulations under the PCT and other PCT-related texts such as the Administrative Instructions, various Guidelines, and publications such as the PCT Applicant's Guide and the PCT Newsletter. He regularly participates in training courses, seminars and international-level meetings on the PCT and advises applicants and their representatives concerning PCT procedures.



## Christopher Casley

**Christopher Casley**, Patent Attorney at Mewburn Ellis, handles the full range of patent work in the life sciences sector, from pre-drafting advice to drafting and prosecution of worldwide patent portfolios. He also has experience with IP due diligence and European oppositions.

His areas of expertise include biological therapeutics, including antibody-drug conjugates; prognostic and treatment response predictive methods, including related computational biology; cancer therapeutics, diagnostics and biomarkers, and nanomedicine.

Chris has a degree in natural sciences (pharmacology) from the University of Cambridge and a PhD from University College London, relating to the neurochemistry of Alzheimer's disease. He carried out post-doctoral research at a multinational pharmaceutical company before joining Mewburn Ellis LLP in 2004, qualifying as a Chartered Patent Attorney in 2007 and a European Patent Attorney in 2008. He joined the partnership in 2011.

# Course date

**26-27 September 2024** **Classroom**  
London  
Course code 14360

GBP **1,199** ~~1,399~~

EUR **1,729** ~~2,009~~

USD **1,977** ~~2,289~~

**Until 22 Aug**

## How to book



**Online:**

[ipi.academy/2199](https://ipi.academy/2199)

Alternatively contact us to book, or if you have any queries:



**Email:**

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**Phone:**

[+44 \(0\)20 7749 4749](tel:+442077494749)

## Discounts

- Booking more than one delegate on any one date qualifies for a **15% discount** on the second and subsequent places.
- Most events qualify for an **early booking discount** prior to 6 weeks before the course date. Be sure to check on our website, where the latest discounts will be shown.

## Further information

### Fee

The fee includes all meals and refreshments for the duration of the course (for venue-based courses) and a complete set of course materials (provided electronically). If you have any particular requirements, please advise customer services when booking.

### Please note

IPI Academy (and our training partners) reserve the right to change the content and timing of the programme, the speakers, the date and venue due to reasons beyond their control. In the unlikely event that the course is cancelled, we will refund the registration fee and disclaim any further liability.

### Terms and conditions

The rest of our terms, the event cancellation policy and the terms and conditions are on our website, please visit [ipi.academy/content/terms-and-conditions](https://ipi.academy/content/terms-and-conditions)

# Reviews



**Excellent course and speakers with practical presentations. The course which every IP Administrator should attend at least once.**

 **Heidi Lovikka**  
BERGGREN OY AB  
Oct 12 2023



**Excellent course and speakers with practical presentations. The course which every IP Administrator should attend at least once.**

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**I was hoping to get the latest updates with further explanation, which I indeed got.**

 **Patricia Hermodsson**  
Patent paralegal  
Alfa Laval Corporate AB  
Oct 12 2023



**This is an excellent program. The speaker's expertise was on full display and the attendees made for a great conference. I really hope to attend next year!**

 **Paul McBean**  
Sr. Foreign Filing Specialist  
Baker Donelson  
Oct 12 2023

## Run this programme in-house for your whole team

Coming to IPI Academy for your in-house training provides an all-inclusive service which gives you access to a wide variety of content, learning platforms and delivery mechanisms as well as your own personal training adviser who will work with you from the initial enquiry through to feedback and follow-up after the programme.

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For your FREE consultation and to find out more about how we can work with you to solve your training needs, please contact our training advisers:



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IPI Academy is a training initiative of Falconbury and Management Forum; leading providers of industry training for over 30 years, based in the UK.

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