IPI Academy

MANAGEMENT forum



Presented by
Management Forum

The Patent Administrator

8 March 27
+ 15-16 September 27

This training course will give you a comprehensive introduction to the role of the patent administrator, including filing requirements in key jurisdictions

Format:
Live online

CPD:
6 hours for your records

Certificate of completion

Course overview

This intensive one-day training course will give you a comprehensive introduction to the role of the patent administrator. It is a highly complex area due to many different procedures across different patent offices. The programme will demystify these procedures and filing requirements in key jurisdictions, and will improve your knowledge and skills so you can work more efficiently and excel in your role.

Topics to be covered include:

- Introduction to patents
- Understanding filing procedures and systems
- Electronic filing (including hands-on exercises and demonstrations)
- Handling post-filing communications from national and international offices
- Renewing your patents
- Recording assignments and name changes
- Overview of licences and royalties
- Obtaining and using patent information

Benefits of attending

By attending this training course, you will:

- **Gain** an invaluable introduction to working with patents
- **Achieve** a greater understanding of patent administration and where your role sits within the team
- **Improve** your understanding of the filing requirements in key jurisdictions – what to do and when
- **Learn** about electronic filing at the EPO via practical exercises and demonstrations
- **Understand** how to calculate renewal payments – how to pay and when

A series of exercises throughout the training course will give participants the opportunity to apply what they have learned in a practical context under the guidance of our expert trainer.

Delegates will receive course materials containing comprehensive documentation, which will be a valuable source of reference for the future.

Who should attend?

This training course is designed especially for those new to the role, or with little experience of patent administration, and those looking for more training to extend their knowledge, including:

- Patent administrators and assistants
- Formalities administrators
- Patent and IP coordinators
- Other IP support staff

The training course offers a valuable networking opportunity with others in similar roles from different organisations and countries.

Programme

Introduction to patents

- Registered and unregistered rights
- What is a patent?
- Why apply for a patent?
- How long will it last?

Organisation of the IP department

- Composition of the team
- Your role within the team
- Differences between private practice and industry

Filing procedures and systems

- International conventions
- National patent systems
- International patent systems
- Stages of a patent application
- Requirements for filing applications
  - Nationally
  - At the EPO
  - At WIPO
- Electronic filing – epoline
- Electronic filing demonstration – EPO CMS
- Record keeping/working with your in-house system
- Practical exercise

Post-filing communications

- Due dates and deadlines
- GB applications
- European applications
- Divisional applications
- PCT applications
- Euro-PCT applications
- Calculation of dates
- Practical exercise

Renewals

- How are renewal fees calculated?
- When can you pay renewals?
- How can you pay renewals?
- Practical exercise

Supplementary Protection Certificates (SPCs)

- What are SPCs?
- When are SPCs applicable?
- Brief overview of how SPCs work

Assignments and name changes

- Why is an assignment required?
- Recording an assignment
- Recording a name change

Licences and royalties

- What is a licence?
- Why license your patents?

Patent information

- Useful literature
- Useful websites
- Products and services of the EPO, UKIPO, WIPO

Presenter



JoAnna Emery

JoAnna Emery, Head of Pure Ideas and Group Formalities at Pure Ideas Ltd, is an experienced intellectual property specialist with over two decades of transatlantic expertise in various roles within the IP industry. She has worked in various industries from US defence, water, financial and the FMCG sector. During her career she has gained knowledge in all areas of intellectual property law as well as gaining experience in corporate transactions and social media. Inspiring, training and managing teams, she is a seasoned speaker at international conferences. JoAnna is a certified legal assistant specialist in intellectual property in the US and a Fellow of the Institute of Paralegals in the UK.

Course dates

8 March 27	**Live online** 09:30-17:00 **UK (London)** (UTC+00) *Course code 16999*	GBP **599** ~~699~~ EUR **839** ~~979~~ USD **963** ~~1,119~~ **Until 11 Jan**
15-16 September 27	**Live online** 13:30-17:00 **UK (London)** (UTC+01) *Course code 17321*	GBP **599** ~~699~~ EUR **839** ~~979~~ USD **963** ~~1,119~~ **Until 21 Jul**

How to book

Online:
ipi.academy/1356

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

Email:
info@ipiacademy.com

Phone:
+44 (0)20 7749 4749

Discounts

- Booking more than one delegate on any one date qualifies for a **30% 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 the our terms, the event cancellation policy and the terms and conditions are on our website, please visit ipi.academy/content/terms-and-conditions

Reviews

★★★★★

I would recommend this course to anyone who wants to find out more about Patents and IP, speaker was great and the slides were really informative. I wanted to get an understanding of patents and IP as I have just joined a new team and needed to expand my knowledge. I feel that speaker did this through her teaching—was very knowledgeable about patents and IP, she was very good at asking if anyone had questions and answering any that had come up. She made the course easy to follow and explained in great details about each part which covered both new learners and people who have more experience.

Sophie Collins
Trainee Formalities Officer
DIPR
Oct 13 2025

★★★★☆

I wanted to learn more about IP administration and improve my practical knowledge. I think the webinar achieved this and gave me useful insights for my work. Overall, it was a well-structured and informative webinar. The content was relevant, and the speaker presented it clearly and professionally.

Maria-Bella van Walstijn
Validation Manager
Nordic Patent Service A/S
Oct 13 2025

★★★★☆

Everything worked well. I liked the clear explanations and practical examples. It was easy to follow and relevant to my daily work.

Maria-Bella van Walstijn
Validation Manager
Nordic Patent Service A/S
Oct 13 2025

★★★★☆

It was a well-structured programme.

Maria-Bella van Walstijn
Validation Manager
Nordic Patent Service A/S
Oct 13 2025

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.

With over 600 trainers, all practitioners and experts across a huge range of fields, we can provide the training you need, where you need it, when you need it, and at a price which suits your budget. Our approach to tailored learning and development consists of designing and delivering the appropriate solution for each client.

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:



ALEKSANDRA BEER
Tel: +44 (0)20 7749 4749
Email:
inhouse@ipiacademy.com



YESIM NURKO
Tel: +44 (0)20 7749 4749
Email:
inhouse@ipiacademy.com



Harry ALTAMONT
Tel: +44 (0)20 7749 4749
Email:
inhouse@ipiacademy.com

IPI Academy

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

10-12 Rivington Street
London EC2A 3DU

ipi.academy
Tel: +44 (0)20 7749 4749
Email: info@ipiacademy.com