



Canadian Intellectual  
Property Office

Office de la propriété  
intellectuelle du Canada

Canada

# CIPO Name Intake Processes and Challenges

Briefing Material for WIPO Name Standardization  
Workshop

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# Introduction



CIPO administers several intellectual property (IP) rights: Patents, Trademarks, Copyright, and Industrial Designs

- Each IP right has distinct intake processes



Accurate name intake is essential to maintain trusted public records, ensure correct ownership, and streamline client services.



This presentation will provide a view of how names are captured, stored, and validated across all CIPO business lines.



# Legislative and Policy Framework

- Name capture is mandated by various IP laws and regulations (Patents Act, Trademarks Act, Copyright Act, Industrial Design Act).
- However, legislation is generally silent on formatting rules and standardization practices.
- **Patents:**
  - Guided by Manual of Patent Office Practice (MOPOP); names must be intelligible to English/French speakers.
- **Trademarks and Industrial Designs:**
  - Names provided 'as-is' by applicants.
- Bilingual representation of names is not legally required in any business line.



# Intake Channels and Platforms

- Applicant names are submitted through various channels depending on the IP right and filing type:
  - Online Portals (eCOM, MyCIPO, ePCT for international filings)
  - Internal Systems (NGP for Patents, DesignPlus for Industrial Designs, INTREPID for Trademarks)
  - Paper or PDF submissions (limited but still in use for certain applications)
- National and international applications follow similar intake principles but use different systems (e.g., InterAPP for international, NGP for national patents).
- Systems vary in their design: some have dynamic fields that adapt based on whether the applicant is an individual or organization.
- While external clients submit data online, internal staff often perform verification and manual entry into core systems.
- All platforms aim to capture applicant names accurately at first point of entry to ensure downstream data integrity.



# Applicant Type Differentiation (Individuals vs Organizations)

- Applicants are categorized as individuals or organizations at the point of intake.
- Online filing systems prompt applicants to select their type, which determines the input fields displayed:
  - Individuals: Separate fields for First Name and Last Name.
  - Organizations: Single field for Organization Name.
- Internal systems often consolidate names into a single field, regardless of applicant type.
- Special considerations: Patents: Inventors must be individuals; organizations cannot be listed as inventors.
- External systems (eCOM) guide applicants to input names from a drop down.



# Bilingual, Character Handling & Formatting

- Names are generally entered and stored 'as provided', with some exceptions:
- **Patents:**
  - International (InterAPP): Allows accented characters (é, ñ) and retains them.
  - National (NGP): Converts special characters to simplified English (é → e).
- **Trademarks and Industrial Designs:**
  - Names accepted as entered, but internal systems often convert to ALL CAPS.
- **Copyright:**
  - Names recorded as entered with minimal processing.
- Special characters, diacritics, and accents are partly supported, depending on the system.
- There is no universal bilingual naming standard across CIPO — handled on a case-by-case basis.



# Validation and Duplicate Name Detection

## Patents

- Manual verification of names using supporting legal documents.
- InterAPP allows searching for similar names; no automatic reconciliation.
- Multiple profiles can exist for the same applicant across applications.

## Trademarks

- Online filing includes search functionality to reuse previously submitted owner names.
- INTREPID stores names in a single field; lacks automated linking for duplicates.
- Manual selection by applicant and verification by staff is required.

## Industrial Designs

- DesignPlus finds exact duplicates but does not catch near-matches.
- Manual comparison required for alternate spellings or variations.
- Duplicate records can still be created across filings.



# Name Change Management (Post-filing Amendments)

- Post-filing name changes occur through correction requests, ownership transfers, and legal orders.

## **Patents:**

- Handled via official processes (assignments, mergers, Section 52 court orders).
- International filings (InterAPP): name changes allowed through system updates or via International Bureau.
- National filings (NGP): changes require manual workflow after client submission.

## **Trademarks:**

- Online services allow Change of Ownership requests.
- INTREPID stores updated owner names, but changes require manual updates.

## **Industrial Designs:**

- Changes captured through corrections; system maintains historical owner records.
- Manual validation ensures divisional filings match parent applications.

## **Challenges:**

- Varying levels of automation and manual effort required.
- Risk of inconsistent updates across systems.





# Standardization Challenges

## **Summary of CIPO's name intake process:**

No unified name management across business lines. Applicants can exist in multiple databases with variations in name formats.

## **Insights from Internal Consultation**

- This project provided valuable insight into name intake practices across all CIPO business lines.
- We developed and distributed a targeted survey to collect standardized responses.
- The feedback helped us identify gaps, inconsistencies, and common challenges.

## **Overall Challenges:**

- Many systems and manual processes increase risk of inconsistency.
- Hard to ensure a single "source of truth" across CIPO.



# Thank You

Khadar Hosh, Data Analyst

Canadian Intellectual Property Office

Name Standardization Workshop May 2025

[Canada.ca/ip-data](https://Canada.ca/ip-data)



# Annex - MyCIPO Portal - Applicant

Applicant(s)

☐ The joint applicants appoint the following applicant as their Common representative

☐ Applicant is also an inventor

\* Order

1

☒ Individual

☐ Firm

\* First name

Last name

Business number

\* Address

\* City

\* Country

--None--

Postal/Zip code

Phone number

Email

Cancel Save

Inventor information

The name and address of each

\*Statement of entitlement(re

(select one)

☐ The applicant is or, if there a

☐ The applicant is the sole inv

☐ joint applicants, the applica

☐ A Statement of entitlement

☒ No Statement of entitlement

Appointment of Common re

The joint applicants appoint the

New applicant

New Inventor



# Annex - MyCIPO Portal - Inventor

Demander(s) Nouveau demandeur

Renseignements sur l'inventeur

Le nom et l'adresse postale de l'inventeur doivent être indiqués ci-dessous :

**Nouvel inventeur**

☐ L'inventeur est aussi un demandeur  
☐ L'inventeur est décédé

\* **Ordre**

1

\* **Prénom**

\* **Nom**

\* **Adresse**

\* **Ville**

\* **Pays**

- Aucun -

Code postal / Code ZIP

Numéro de téléphone

Courriel

\* **Déclaration du droit du demandeur**

(en choisir une)

☐ Le demandeur est admissible  
☐ Le demandeur est le seul inventeur  
☐ d'un demandeur, chacun d'eux  
☐ Une déclaration relative au droit  
☒ Aucune déclaration relative

**Nomination d'un représentant**

Les codemandeurs nomment le demandeur suivant comme leur représentant commun :



# Annex - InterApp- Applicant

Workflow - User and Role Maintenance

**Users**

User ID	Name	Eng/Frn	Bilingual	On Leave	Supervisor	Prim.
PDIONNE	Patrick Dionne	French	YES	2004/01/01 - 2004/		
PDUBOIS	Pierre Dubois	English		2007/10/24 - 2007/		
PDUCHAR	Pierre Ducharme	English		2018/07/18 - 2018/	OPSSecHead	OPSS
PEBSEN	Peter K. Ebsen	French	YES	2004/08/09 - 2007/		
PFITZNE	Paul Fitzner	French		2004/07/28 - 2004/	EXPAB	ESPA
PFRLAN	Paulina Frlan	English		2019/04/30 - 2019/	OSOPS	OSOF
PGALPE	Pauline Galipeau	English		2004/11/25 - 2004/		
PGAUTHI	Pascale Gauthier	English	YES	2013/04/19 - 2013/	OperStats	OperS
PGBOR	Philip Gbor	English		2006/01/24 - 2007/	EXGENEG4	ESGE
PKOCH	Patrick Koch	English		2008/08/27 - 2008/		
PLACHAN	Pascal Lachance	English		2015/07/31 - 2015/	EXBIOTB4	ESBI
PLAFREN	Patrick LaFreniere	English		2014/10/20 - 2014/		

User ID:  First Name:  Last Name:  Telephone Number:

Windows User:

Effective Period: From  To

On Leave Period: From  To

Prim. Lang.:

☐ Bilingual

New Modify Save Cancel Remove Rename Add To Role

**Roles**

RoleID	Name	Parent	Hours	Eng.
ALL	All users		0600-1800	Englis
ATestRole	A Test Role		0600-1800	Englis
AgentMaint	Agent Maintenance	SystemAdmin	0600-1800	Englis
Anani	Anani Classifier	Classifier	0600-1800	Biling
Aubry	Aubry Classifier	Classifier	0600-1800	Biling
BFOVERRIDE	Override BF	SystemAdmin	0600-1800	Englis
BIOTECH			0600-1800	
BSLStats	Operations Stats		0600-1800	Englis
Bayaa	Bayaa Classifier	Classifier	0600-1800	
Beauchemin	Beauchemin Classifier	Classifier	0600-1800	Englis
Buchko	Buchko Classifier	Classifier	0600-1800	Biling
CanAbort	Can Abort task role.	SystemAdmin	0600-1800	Englis

ID:  Parent:

Hours of Operation: From  To

Name n Desc:

New Modify Save Cancel Remove Add To User

**Roles for Selected User**

RoleID	Primary	Repl. User
DistPayments		
Examiner		
CustomView		
DeleteDocs		
IPEAClerk		
IPEAManager		
ISAChecks		
ISAClerk		
MaintDocs		

Action on Selected Role(s)

User's Main Role:  User is:  Primary Secondary

Set as Replacement

Remove Selected Roles

**Users for Selected Role**

User ID	Primary	Repl. Us
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Remove Selected User

**Task Types Using Selected Role**

Task	Name
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