



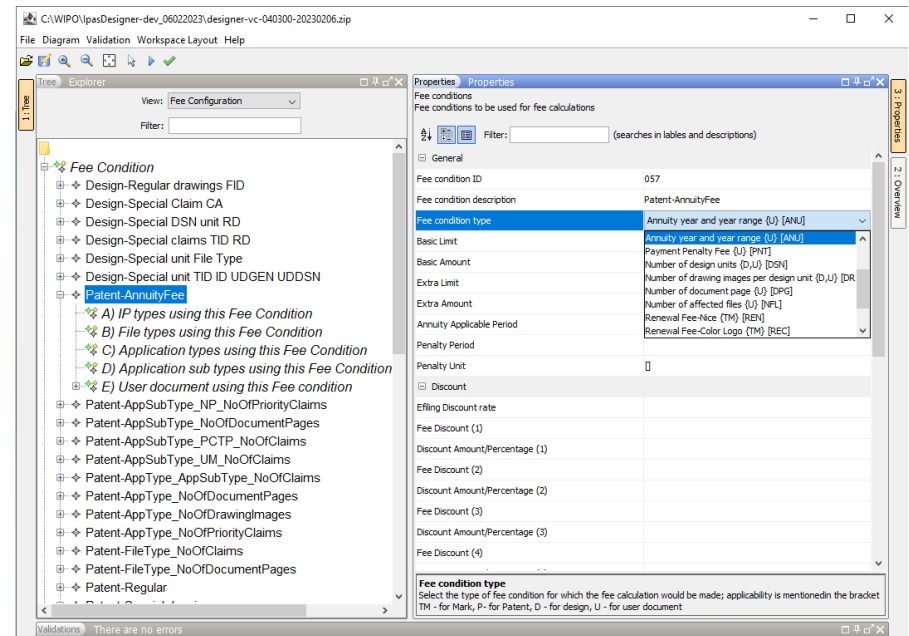
# **WIPO – ASEAN IT Workshop**

## ***Topic 8 WIPO IPAS Cloud Fees Configuration***

*WIPO IP Office Business Solutions Division  
March 27-30, 2023*

# WIPO IPAS / Fee Structure

- System-defined fee types allow customization of fee conditions (ANU, NCL, LGO, etc.)
- 4 scopes for applicability of application fees
  - In case of multiple copies available for the same fee condition, the lowest scope takes preference
- Renewal and annuity fees should be defined at applications instead of user documents



# WIPO IPAS / Tax Structure

- Global taxes in fixed amounts (e.g. special tax collection) or percentages (e.g. VAT), applicable to the entire submission batch / filing dossier, configured by document origin
  - If tax is not included in fee amounts, global taxes are added to make the total payment amount (gross fees excluding taxes, tax amounts, total payment amount including taxes)
  - If tax is included in fee amounts, gross fees are recalculated by excluding applicable global taxes
- Possibility to exclude a fee condition in global tax calculation
- One to many tax elements can be applicable at the same time

# WIPO IPAS / Discount Structure

- E-filing discount type applicable to online filings only (e.g. 5% discount before VAT)
- In addition, one or several discount schemes can be also configured but only one discount scheme is applied for calculation based on the matching provided supporting document proof (e.g. 4% discount if filer=natural person or 2% discount if filer=SME)

# Example of Fees and Tax

The screenshot displays the WIPO IPAS interface for managing fees and taxes. The main content area shows a filing type of 'userdocuments' and a category of 'Change of Name and/or Address'. A summary table on the right highlights the total amounts:

<input type="checkbox"/> Fee Summary	
<input type="checkbox"/> Change of Name and/or Address	36750.00
<input type="checkbox"/> Collective	22750.00
<b>Total Gross amount</b>	<b>EC 56,665.00</b>
<b>Total Tax Amount</b>	<b>EC 2,835.00</b>
<b>Total Payment Amount</b>	<b>EC 59,500.00</b>

The summary table is highlighted with a red border. The interface also includes a 'Supporting Documents List' with items like 'Claims [1]', 'Cover Letter [10]', and 'SME Certificate [SME]', each with an 'Add' button. The top navigation bar includes 'New Batch', 'Print invoice', 'Payment', 'Receive', and 'Print Receipts' buttons, along with a search bar and user profile 'Daniel Cheng'.

# WIPO IPAS / Annuities 1/3

- Annuity fees are to be paid yearly by default
  - But possible to enable Multiple Annuity payment possible
- Configuration to specify how the first annuity expiration date is calculated and apply the same period to other following years

Annuities	
Annuities must be generated	<input checked="" type="checkbox"/>
Multiple Annuity payment possible	<input checked="" type="checkbox"/>
First annuity expires on	Potential entitlement date[4]
Plus days	Potential entitlement date[4]
Plus months	Potential entitlement year end[3]
Grace months	Registration date[6]
Annuities to be ignored	Registration year end[7]
Fixed nbr of annuities to be ignored	Publication date[8]
	Potential entitlement date (Parent)[14]
	Potential entitlement year end (Parent)[13]
	Registration date (Parent) [16]

# WIPO IPAS / Annuities 2/3

- If registration fee includes a few annuity years, details are to be configured

Annuities to be ignored	A fixed number of annuities[2]
Fixed nbr of annuities to be ignored	3

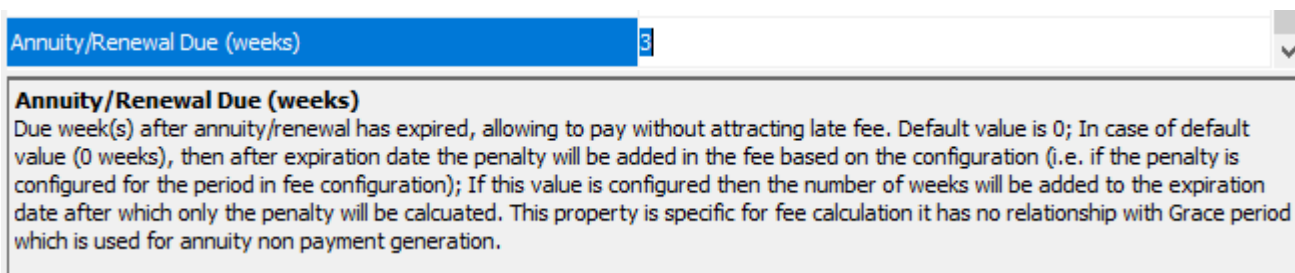
- By default, annuity fees can be paid any time
  - If needed, restriction can be configured to accept reception of annuity user document only N months before the annuity expiration date

Renewal
Months before expiration
6

- By default, penalty fee if configured is calculated after late payment from the annuity expiration date
  - If needed, a few extra months can be offered after expiration date until a cutoff penalty due date

# WIPO IPAS / Annuities 3/3

- By default, configured penalty fees are calculated at late payment time from the annuity expiration date
  - If needed, a few extra months can be offered after expiration date until a cutoff penalty due date



Annuity/Renewal Due (weeks) 3

**Annuity/Renewal Due (weeks)**  
Due week(s) after annuity/renewal has expired, allowing to pay without attracting late fee. Default value is 0; In case of default value (0 weeks), then after expiration date the penalty will be added in the fee based on the configuration (i.e. if the penalty is configured for the period in fee configuration); If this value is configured then the number of weeks will be added to the expiration date after which only the penalty will be calculated. This property is specific for fee calculation it has no relationship with Grace period which is used for annuity non payment generation.

- Possibility to add a warning and a sub-process to handle non-payment of annuity fee after the acceptable time limit



Grace months 6



# Penalties for Late Payments of Annuities

- Penalty is based on the corresponding applicable annuity year
- Penalty is calculated based on unit in weeks or months of late payment

The screenshot displays a software interface with two main windows. The left window, titled 'Tree Explorer', shows a hierarchical list of fee configurations. The right window, titled 'Properties Properties', shows the details for a selected fee condition.

**Tree Explorer (Left Window):**

- View: Fee Configuration
- Filter: [Empty]
- Tree structure:
  - Patent\_Special drawings
    - Patent\_AppSubTypeNoOfDrawingImages
    - Penalty - Annuity (1-5)**
    - Regular fees IP
  - TM-Collective Special claims
  - TM-Collective- Special logo
  - TM-Color logo
  - TM-Color logo 2
  - TM-Nice Class (Trademark - AppSubType)
  - TM-Priority Claims
  - TM-Specific Goods and Services (collective)
  - TM-Trademark Goods and Service (General)
  - UD-Addition of Nice (NCL)(UDGEN)
  - UD-Icon

**Properties Properties (Right Window):**

Fee conditions  
Fee conditions to be used for fee calculations

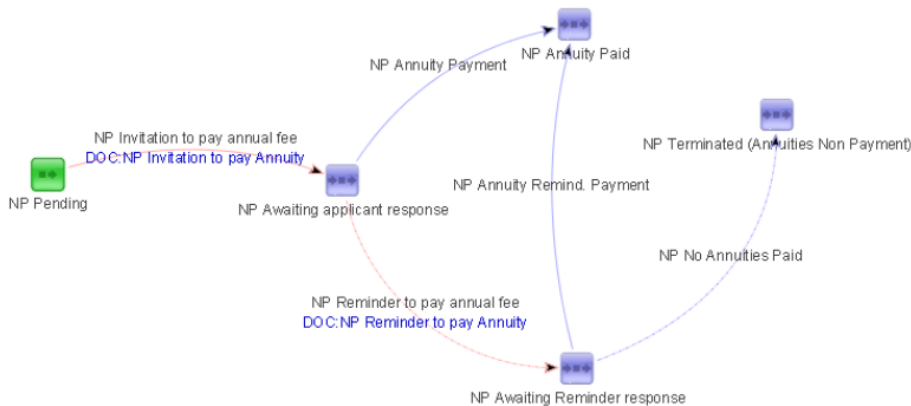
Filter: [Empty] (searches in labels and descriptions)

General

Fee condition ID	061
Fee condition description	Penalty - Annuity (1-5)
Fee condition type	Payment Penalty Fee {U} [PNT]
Basic Limit	1
Basic Amount	20
Extra Limit	1
Extra Amount	20
<b>Annuity Applicable Period</b>	<b>1-5</b>
Penalty Period	1
Penalty Unit	Months [M]

# Non-Payment Sub-process of Annuities

- Grace date (same as annuity expiration date by default)
  - Possibility to add extra months
- Grace date to trigger a sub process to deal with further office decision based on customized due date actions
  - Proposal to add a new parameter to compute due date action based on restoration time limit



File History				
Filter by: All				
Description	Date	Action By	Notes	Action
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capture	2023-02-06 13:28:19	mahi	in Data Caç	
My Sub Process	2023-02-06 13:53:54		Process St	
Manual			Received	
Start process	2023-02-06 13:55:04	mahi	Process St	
ADD SP ACTION				
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