

Registrar's Policies

NAME OF POLICY	Approved Training Programs		
APPLICABLE SECTIONS OF THE ACT, BY-LAWS AND REGULATIONS and/or PURPOSE	CPATA Act Sections 26(2) and 29(2) CPATA Regulation Sections 7(b)(i) and 11(b)(i) By-laws Section 54		
RESPONSIBILITY	Registrar		
APPROVED BY	EFFECTIVE	REVIEWED	REVISED
Registrar	May 1, 2023		

In this policy:

- a. "Applicant" means an individual who has applied for registration as a Class 3 Agent in Training licensee.
- b. "Agent in Training" or "Trainee" means an individual who is registered as a Class 3 licensee and is in progress with the requirements to become licensed as a patent agent or trademark agent.
- c. "Supervisor" means a Class 1, Class 2 licensee, or representative of the Patent Office or of the Office of the Registrar of Trademarks who has applied to the Registrar to oversee the training of a Class 3 licensee, including the presentation and prosecution of applications before the Canadian Intellectual Property Office ("CIPO").

Policy

CPATA is committed to setting standards of excellence for professional practice and helping licensees adhere to high competence and ethical standards. This enhances confidence in intellectual property professionals and services they provide. To this end, CPATA ensures licensees deliver ethical and competent patent and trademark services through admissions programs designed to develop the competence of trainees, and promote equity, diversity and inclusion in the profession and the delivery of services¹.

As an evidence-based regulator, information is needed to inform the development of entry-to-practise pathways. To this end, research is underway to identify if there are other formal education and/or training opportunities that trainees can undertake to learn the knowledge concepts and obtain the skills

¹ [Board Policy 2 – Regulatory Objectives, Standards and Principles](#)

set out in the [CPATA Technical Competency Profiles for Patent Agents and Trademark Agents](#), and understand their professional obligations under the [Code of Professional Conduct](#).

Until additional entry-to-practise pathways are available, the approved training program required to establish eligibility for the qualifying examinations under section 54 of the by-laws is **completion of twenty-four (24) months of training under the supervision of an approved training Supervisor, or the equivalent as determined by the Registrar's Policy on Prior Experience Assessments**.

Training can be completed on a full-time or part-time basis.

Trainees can apply for recognition of prior experience completed during an internship or articling term if the training was supervised by a class 1 or class 2 licensee, or as described in the [Registrar's Policy on Prior Experience Assessments](#).

Supervisors are expected to provide training experiences that support the development of technical and professional competencies, which will prepare them for the qualifying examinations and professional practice.

With respect to Supervisor applications, the Registrar must:

1. Request additional information if the Registrar is unable to render a decision based on the information provided. Upon receipt the Registrar will reconsider the application; or
2. Authorize the Supervisor to supervise the applicant if they meet the requirements set out in the by-laws; or
3. Deny the request for the Supervisor to supervise the applicant if they do not meet the requirements set out in the by-laws.

Details regarding the actions the Registrar may take with respect to recognition of prior experience, please review the [Registrar's Policy on Prior Experience Assessments](#).

Procedures

1. An Applicant submits an application to register as a Class 3 licensee, which includes the Training Supervisor Application Form, and/or their request for a prior experience assessment.
2. Registration staff review the application, including all supporting documentation.
3. If the applicant submitted a request for a prior experience assessment, the procedures under the [Registrar's Policy on Prior Experience Assessments](#) will be applied.
4. The Registrar will review the Training Supervisor Application form and training agreement to confirm the requirements regarding Supervisors² are met and render a decision.
5. The College will provide the Registrar's written decision to the applicant and will provide instructions for appealing the decision to the Registration Committee should the Registrar decide to deny a Supervisor application request and/or deny the recognition of prior experience or grant partial recognition of prior experience.

² By-laws Section 64

6. The applicant may request a review of the Registrar's decision in accordance with the by-laws and the [Registrar's Policy in Requesting a Review of a Registrar's Decision](#).

References

[CPATA Act](#)

[CPATA Regulations](#)

[CPATA By-laws](#)

[Registrar's Policy on Prior Experience Assessments](#)

[CPATA Technical Competency Profiles for Patent Agents and Trademark Agents](#)

[Code of Professional Conduct](#)