

Annual Licensee Report – Consultation

Background

When a licensee completes their annual licence renewal, they must answer certain declaration questions called the 'Annual Licensee Report', as required by CPATA's By-laws. Starting in 2025, in addition to already existing questions about professional liability insurance, Section 73 By-law compliance and Canadian residence, CPATA will be adding further questions, both mandatory and voluntary. These questions will enable CPATA to collect all the information required by its By-laws and additional data necessary to understand trends in the composition and practice of the professions over time. It is common and best practice for regulators to have reporting requirements such as these and collecting this data will help enable CPATA to make evidence-based decisions.

Annual Licensee Report

The mandatory Annual Licensee Report is expected to take approximately 15-30 minutes to complete. The answer to some questions will be pre-populated based on information already stored in the licensees' profile. Not all licensees will be asked all questions depending on their circumstances. The purpose of these questions is to:

- collect information required by CPATA's By-laws;
- ensure that personal and work information is accurate in the Public Register;
- gather data necessary for understanding the IP services landscape in Canada;
- ensure that licensees are meeting their obligations around insurance, Canadian residency and Section 73 of the By-laws.

In addition to the mandatory Annual Licensee Report, CPATA is also consulting on the proposed questions for the optional Demographic Survey. The details of those voluntary questions are also open to consultation and can be found on [this page](#).

Privacy and Data Management

CPATA takes the confidentiality and privacy of licensees seriously. The information provided by licensees in either the Annual Licensee Report or the Demographic Survey is collected under the authority of CPATA's By-laws and the *Privacy Act*. The College [Privacy Statement](#) outlines more information on a licensee's privacy practices and privacy rights. Data is collected through and stored in the Olatech Corporation Licensee Portal platform. If you have any questions about this, please contact priv@cpata-cabamc.ca.

How to provide feedback

The proposed Annual Licensee Report questions are below. CPATA welcomes feedback on the proposed Annual Licensee Report and Demographic Survey questions by e-mail to info@cpata-cabamc.ca between **October 15 and November 15, 2024**. CPATA will take into consideration any comments before finalizing the questions for the 2025 licence renewal period.

Annual Licensee Report – Proposed Questions

Confirmation of Personal Information

1. I confirm that all of my personal information is correct and up to date.

Yes

No

2. I confirm that my place of work information is up to date.

Yes

No

Work Information

3. Are you currently working as an agent?

Yes

No

4. Are you open to taking on new clients?

Yes

No

5. In which of the following languages do you provide professional services? Select all that apply.

English

French

Other (please specify all additional languages)

6. What best describes your primary practice setting?

Academic institution

Government

Corporate (in-house)
IP agency
Law firm
Sole practitioner
Not applicable
Other (please specify)

7. How many agents work in your firm/organization?

1 agent (sole practitioner)
2-5 agents
6-10 agents
11-25 agents
26+ agents
Not applicable
Not sure

8. Which best describes your primary practice setting?

Start-up (a company in the first stages of operations)
Small & Medium Sized Enterprise (Privately held)
Large Enterprise (Privately held)
Publicly traded company
Other (please specify)

9. Do you work for a federal, provincial, or municipal department or agency?

Federal
Provincial
Municipal
Crown Corporation
Other (please specify)

10. Estimate what percentage of your Patent Agent work, in terms of time spent, involves what you would consider:

Associate prosecution: %
Originating prosecution: %
Opinion work (originating or associate): %

Licensing work: %

Litigation/Litigation Support: %

Not applicable:

- a. I am a litigator
- b. I work in-house but my role doesn't include any of the above
- c. I am not in active practice
- d. I engaged in drafting but the patents were filed under another agent's name
- e. Other (please specify)

11. What percentage of your Patent Agent work involves the following?

Developing client-centred patent strategies: %

Drafting patent applications: %

Prosecuting patent applications: %

Assessing validity: %

Assessing infringement: %

Client meetings & communications: %

Not applicable

- a. I am a litigator
- b. I work in-house but my role doesn't include any of the above
- c. I am not in active practice
- d. I engaged in drafting but the patents were filed under another agent's name
- e. Other (please specify)

12. Please estimate how many patent applications you have filed in the last year that were:

Direct patent application filings before CIPO

0

1-5

6-10

11-25

26-50

51-100

101-200

201+

Associate patent application filings before CIPO

0

1-5

6-10

11-25
26-50
51-100
101-200
201+

Direct patent application filings before WIPO

0
1-5
6-10
11-25
26-50
51-100
101-200
201+

Associate patent application filings before WIPO

0
1-5
6-10
11-25
26-50
51-100
101-200
201+

Direct patent application filings before USPTO

0
1-5
6-10
11-25
26-50
51-100
101-200
201+

Associate patent application filings before USPTO

- 0
- 1-5
- 6-10
- 11-25
- 26-50
- 51-100
- 101-200
- 201+

Direct patent application filings in jurisdictions other than WIPO, US and Canada

- 0
- 1-5
- 6-10
- 11-25
- 26-50
- 51-100
- 101-200
- 201+

Associate patent application filings in jurisdictions other than WIPO, US and Canada

- 0
- 1-5
- 6-10
- 11-25
- 26-50
- 51-100
- 101-200
- 201+

13. How many patents were you responsible for maintaining in the last year?

- 0
- 1-5
- 6-10
- 11-25

26-50
51-100
101-200
201+

14. What % of your patent client base falls under each of the following categories:

Start-up (a company in the first stages of operations): %
Small & Medium Sized Enterprise (Privately held): %
Large Enterprise (Privately held): %
Publicly traded company: %
Investors (VCs/PEs): %
Research organizations, government or academic institutions: %

15. Estimate what percentage of your Trademark Agent work, in terms of time spent, involves what you would consider:

Prosecution for foreign entities: %
Prosecution for Canadian entities: %
Search opinions (originating or foreign associates): %
Licensing work: %
Litigation/Litigation Support: %
Not applicable
a. I am a litigator
b. I work in-house but my role doesn't include any of the above
c. I am not in active practice
d. I engaged in drafting but the trademarks were filed under another agent's name
e. Other (please specify)

16. What percentage of your Trademark Agent work involves the following:

Assessing the registrability of trademarks: %
Developing client-centred trademark strategies: %
Prosecuting trademark applications: %
Representing clients before the Trademarks Opposition Board: %
Client meetings & communications : %
Not applicable
a. I am a litigator
b. I work in-house but my role doesn't include any of the above

- c. I am not in active practice
- d. I engaged in drafting but the trademarks were filed under another agent's name
- e. Other (please specify)

17. Please estimate how many trademarks applications you have filed in the last year that were:

Direct trademark application filings before CIPO

- 0
- 1-5
- 6-10
- 11-25
- 26-50
- 51-100
- 101-200
- 201+

Associate trademark application filings before CIPO

- 0
- 1-5
- 6-10
- 11-25
- 26-50
- 51-100
- 101-200
- 201+

Direct trademark application filings before WIPO

- 0
- 1-5
- 6-10
- 11-25
- 26-50
- 51-100
- 101-200
- 201+

Associate trademark application filings before WIPO

0
1-5
6-10
11-25
26-50
51-100
101-200
201+

Direct trademark application filings before USPTO

0
1-5
6-10
11-25
26-50
51-100
101-200
201+

Associate trademark application filings before USPTO

0
1-5
6-10
11-25
26-50
51-100
101-200
201+

Direct trademark application filings in jurisdictions other than WIPO, US and Canada

0
1-5
6-10
11-25

26-50
51-100
101-200
201+

Associate trademark application filings in jurisdictions other than WIPO, US and Canada

0
1-5
6-10
11-25
26-50
51-100
101-200
201+

18. How many trademarks were you responsible for maintaining in the last year?

0
1-5
6-10
11-25
26-50
51-100
101-200
201+

19. What % of your trademark client base falls under each of the following categories:

Start-up (a company in the first stages of operations): %

Small & Medium Sized Enterprise (Privately held): %

Large Enterprise (Privately held): %

Publicly traded company: %

Investors (VCs/PEs): %

Research organizations, government or academic institutions: %

Other (please specify)

20. In which of the following practice areas do you feel you have significant expertise? Please check all that apply.

Aerospace and aviation
Agriculture
Artificial Intelligence
Automotive
Cannabis
Chemical and Biotechnology
Cleantech
Clothing and Apparel
Computers
Consumer Products
Cryptocurrency
Electronics
Energy
Financial Services and Technology
Food and Beverage
Manufacturing
Medical Devices
Mining
Pharmaceuticals
Railways
Robotics
Software
Telecommunications
Other (please specify)

Other Professional Licences

21. Do you hold any other professional licences in Canada?

Yes

No

22. Please select the professional regulator. Select all that apply.

Law Society of British Columbia
Law Society of Alberta

Law Society of Saskatchewan
Law Society of Manitoba
Law Society of Ontario
Barreau du Québec
Chambre des notaires du Québec
Law Society of New Brunswick
Nova Scotia Barrister's Society
Law Society of Prince Edward Island
Law Society of Newfoundland and Labrador
Law Society of Yukon
Law Society of the Northwest Territories
Law Society of Nunavut
Engineers and Geoscientists British Columbia
Association of Professional Engineers and Geoscientists of Alberta (APEGA)
Engineers Geoscientists Manitoba
Engineers and Geoscientists New Brunswick
Association of Professional Engineers and Geoscientists of Saskatchewan (APEGS)
Engineers Nova Scotia
Engineers PEI
Engineers Yukon
Northwest Territories and Nunavut Association of Professional Engineers and Geoscientists (NAPEG)
Ordre des ingénieurs du Québec (OIQ)
Professional Engineers and Geoscientists of Newfoundland and Labrador (PEGNL)
Professional Engineers Ontario (PEO)
Other (please specify)

23. In what year did you first register?

24. What is the status of your licence?

Active
Active with conditions
Inactive
Suspended
Revoked
Surrendered
Other (please specify)

25. Are you a licensed patent agent or trademark agent in another jurisdiction?

Yes

No

26. With which other foreign IP body are you licensed? Select all that apply.

USPTO (United States Patent Office)

EPO (European Patent Office)

CNIPA (China National Intellectual Property Administration)

Another foreign IP office: please specify

Continuing Professional Development

Please note: CPATA does **not** currently have requirements for continuing professional development.

27. How many hours of continuing professional development specifically relevant to the work you undertake as a CPATA licensee did you undertake in the past year?

0

1-5

6-10

11-20

21-50

51+

I acknowledge that I have answered these questions truthful and verifiably.