



Instructions for administrators

How to administer authorized users on the myAXA client portal

Application

How to administer authorized users on the myAXA client portal

Date of creation

13.06.2019



Contents

1. Entering authorized users.....	1
2. Manage user rights.....	9
3. Carry out personnel changes	12
4. Delete user rights.....	13

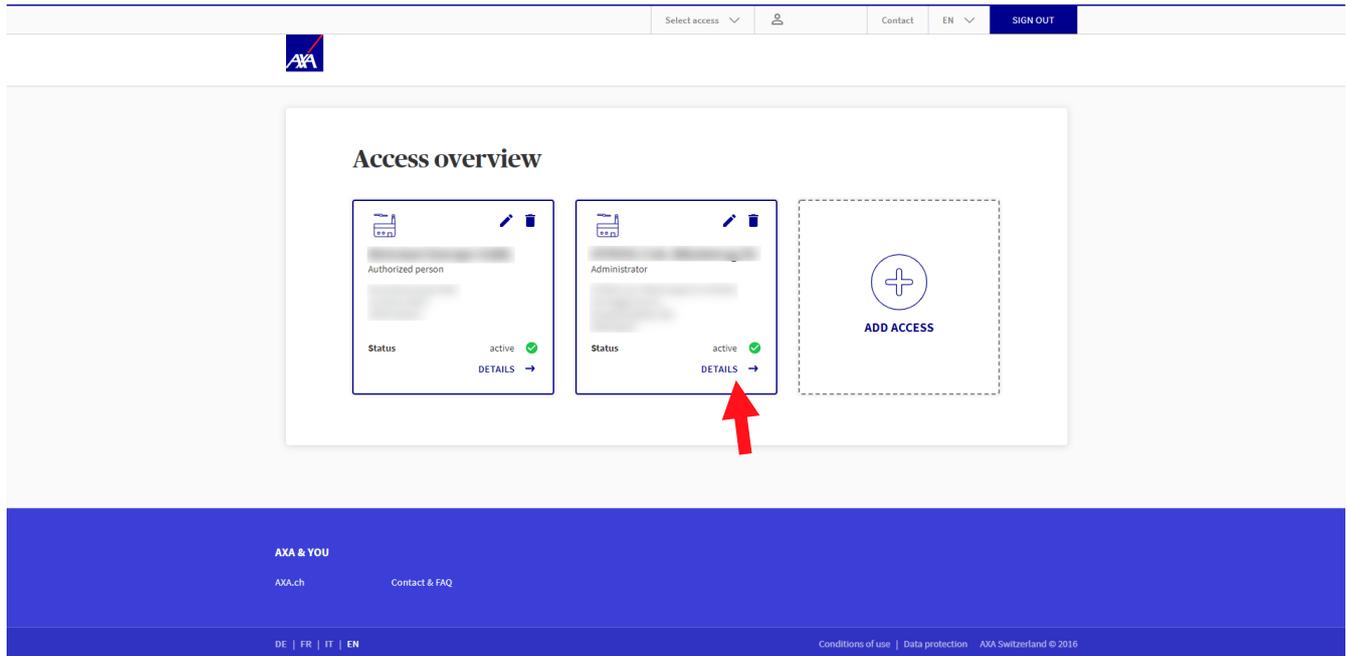


1. Entering authorized users

Are you an administrator and would you like to give a new user access to myAXA?

If so, then please proceed as follows:

- If you have more than one access: Please select the desired access in the overview under «Select access» or on the relevant tile under Details.





- Click on the «Rights & powers of attorney» tab.

The screenshot shows the AXA client portal interface. At the top, there is a navigation bar with the AXA logo on the left and a menu on the right containing 'Access overview', 'Administrator', 'Contact', 'EN', and 'SIGN OUT'. Below this is a secondary navigation bar with tabs for 'CONTRACTS', 'DOCUMENTS', 'CLAIMS', 'CUSTOMER DATA', and 'RIGHTS AND POWERS OF ATTORNEY'. A red arrow points to the 'RIGHTS AND POWERS OF ATTORNEY' tab. The main content area features a 'REPORT A CLAIM' button, a 'Contracts' section with five insurance cards (Financial loss liability insurance, two Motor vehicle insurance cards, Personal insurance "Professional", and Property insurance "Professional"), and three promotional icons: 'Insurance Check for SMEs', 'Online legal portal MyRight.ch (in german)', and 'HOTELCARD - THE HALF-PRICE FOR HOTELS WITH 25% DISCOUNT'. The footer contains 'AXA & YOU', 'AXA.ch', 'Contact & FAQ', and 'DE | FR | IT | EN' on the left, and 'Conditions of use | Data protection | AXA Switzerland © 2016' on the right.



- Click on «Add user».

The screenshot shows the AXA myAXA client portal administration interface. At the top, there is a navigation bar with the AXA logo, a user profile icon, and a 'SIGN OUT' button. Below this is a menu with options: CONTRACTS, DOCUMENTS, CLAIMS, CUSTOMER DATA, and RIGHTS AND POWERS OF ATTORNEY. The main content area features a 'REPORT A CLAIM' button and a section titled 'Rights and powers of attorney'. This section includes a blue bar with an information icon and the text 'How to administer your users on the myAXA client portal: DOWNLOAD THE INSTRUCTIONS'. Below this, it shows 'Contract for portal access' with 'Status: activ' and 'Contact person: [redacted]'. A user card for 'Gesvalor, Jean' is displayed as an Administrator with 'Status: active' and a green checkmark. To the right of the user card is a dashed box containing a plus sign icon and the text 'ADD USER', with a red arrow pointing to it. The footer contains 'AXA & YOU', 'AXA.ch', 'Contact & FAQ', and 'Conditions of use | Data protection | AXA Switzerland © 2016'.



- Enter the new user's email address and date of birth.
- Click on «Continue».

AXA

← Access overview Administrator Contact EN SIGN OUT

CONTRACTS DOCUMENTS CLAIMS CUSTOMER DATA RIGHTS AND POWERS OF ATTORNEY

Enter user

IDENTIFICATION DETAILS USER DETAILS USER RIGHT DATA SAVED

Identification details

Email address *

Date of birth *

CANCEL CONTINUE

AXA & YOU
AXA.ch Contact & FAQ

DE | FR | IT | EN Conditions of use | Data protection | AXA Switzerland © 2016



- User not yet available?
- Fill in all fields marked with *.
- Click on «Continue».

← Access overview Administrator Contact EN SIGN OUT

CONTRACTS DOCUMENTS CLAIMS CUSTOMER DATA RIGHTS AND POWERS OF ATTORNEY

Enter user

1 IDENTIFICATION DETAILS 2 USER DETAILS 3 USER RIGHT 4 DATA SAVED

Personal details

Title *

First name *

Last name *

Date of birth

Correspondence language *

User account

Email address

Phone number *

TAN type *

Contact details

Phone number for calls *

AXA & YOU
AXA.ch Contact & FAQ

DE | FR | IT | EN Conditions of use | Data protection AXA Switzerland © 2018



- User already existing?
- The new user's personal information and access data will be automatically filled in if the user is already registered on myAXA.
- Click on «Continue».

The screenshot shows the 'Enter user' form in the myAXA administrator interface. The form is titled 'Enter user' and has a close button (X) in the top right corner. It is divided into four steps: 1. IDENTIFICATION DETAILS, 2. USER DETAILS, 3. USER RIGHT, and 4. DATA SAVED. The 'USER DETAILS' step is currently active. The form contains the following fields:

- Personal details**
 - Date of birth:
- User account**
 - Email address:
- Contact details**
 - Phone number for calls *:

At the bottom of the form, there are two buttons: 'BACK' and 'CONTINUE'.

The interface also includes a top navigation bar with 'Access overview', 'Administrator', 'Contact', 'EN', and 'SIGN OUT'. Below this is a secondary navigation bar with 'CONTRACTS', 'DOCUMENTS', 'CLAIMS', 'CUSTOMER DATA', and 'RIGHTS AND POWERS OF ATTORNEY'. The footer contains 'AXA & YOU', 'AXA.ch', 'Contact & FAQ', and 'DE | FR | IT | EN'.



- You can now assign the authorizations to the new user: By clicking on the boxes, you can select the contracts that the user may view.
- Click on «Continue» to confirm the acquisition.

The screenshot shows the AXA user management interface. At the top, there is a navigation bar with the AXA logo, a user profile icon, and a 'SIGN OUT' button. Below the navigation bar, there are tabs for 'CONTRACTS', 'DOCUMENTS', 'CLAIMS', 'CUSTOMER DATA', and 'RIGHTS AND POWERS OF ATTORNEY'. The main content area displays a modal window titled 'Enter user' with a close button (X) in the top right corner. The modal has a progress bar with four steps: 'IDENTIFICATION DETAILS', 'USER DETAILS', 'USER RIGHT', and 'DATA SAVED'. The 'USER RIGHT' step is currently active. Under the 'User right' heading, there are two rows of insurance contracts. The first row is 'Personal insurance "Professional!"' with a status of 'In force' and a checked 'Released' checkbox. The second row is 'Property insurance "Professional!"' with a status of 'In force' and an unchecked 'Released' checkbox. A 'SAVE' button is located at the bottom right of the modal. The footer of the page contains the text 'AXA & YOU', 'AXA.ch', 'Contact & FAQ', and 'Conditions of use | Data protection | AXA Switzerland © 2016'.



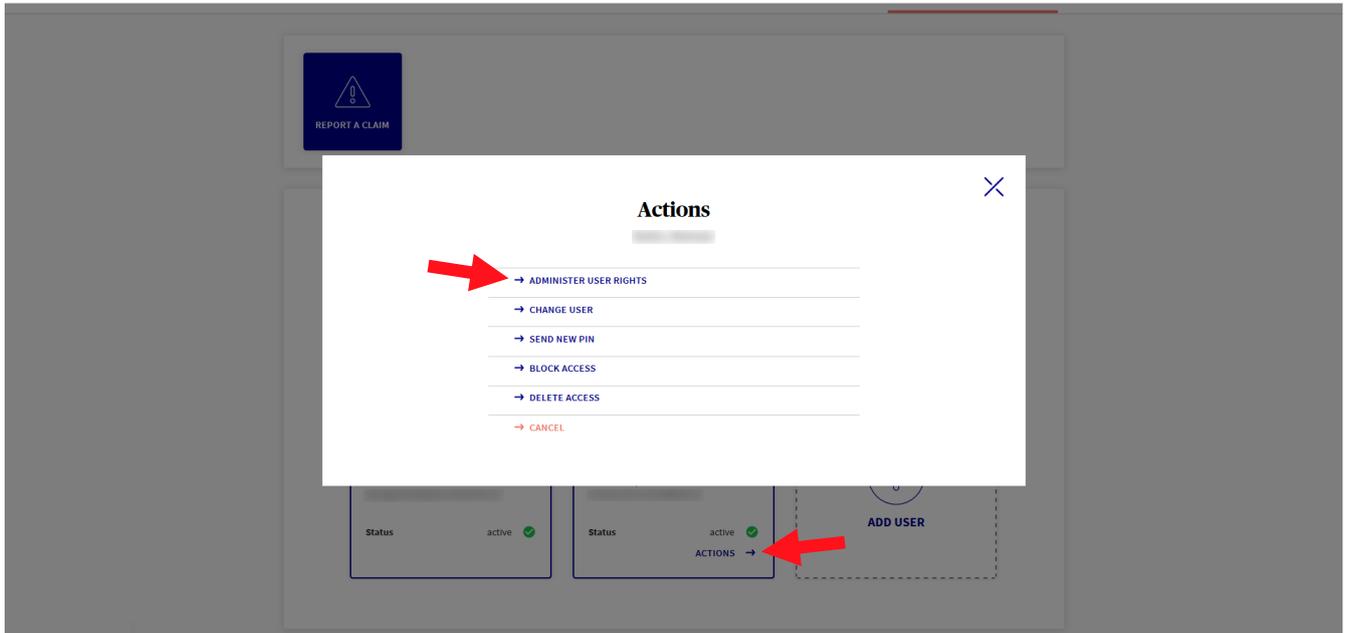
- You have successfully created the power of attorney.
- The activation information was automatically sent to the user via email.

The screenshot displays the AXA administrator portal. At the top, there is a navigation bar with the AXA logo on the left and menu items: Access overview, Administrator (with a dropdown arrow), Contact, EN (with a dropdown arrow), and SIGN OUT. Below this is a secondary navigation bar with links for CONTRACTS, DOCUMENTS, CLAIMS, CUSTOMER DATA, and RIGHTS AND POWERS OF ATTORNEY. The main content area features a modal window titled "Enter user" with a close button (X) in the top right corner. Inside the modal, a green banner with a white checkmark icon contains the text: "The user was successfully created." Below this, it states: "The activation information was sent to the email address [redacted]." At the bottom of the modal, there are two buttons: "USER OVERVIEW" (with a group of people icon) and "ADD NEW USER" (with a plus sign icon). The footer of the page is dark blue and contains the text "AXA & YOU" with links to "AXA.ch" and "Contact & FAQ". At the very bottom, it lists language options "DE | FR | IT | EN" and legal information: "Conditions of use | Data protection | AXA Switzerland © 2016".



2. Manage user rights

- You can view the authorized person's rights at any time:
On the line with the relevant person's name, click on «Actions» and select «Manage user rights».



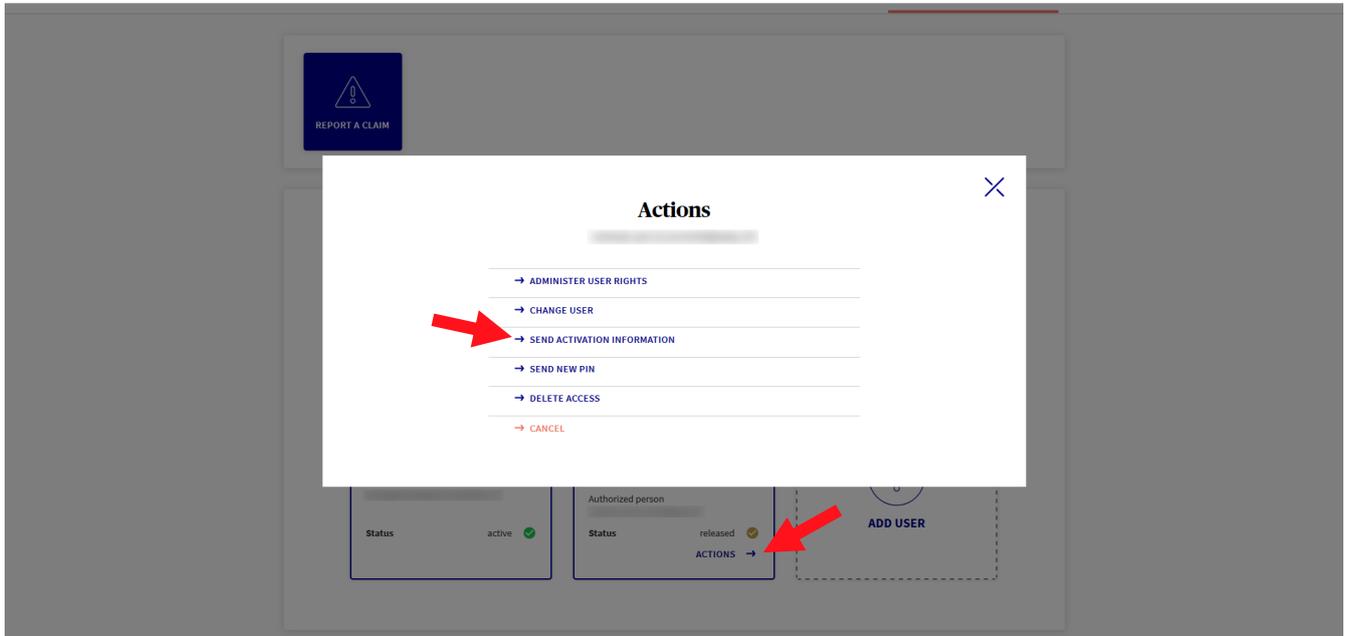


- The various contracts are listed; if you set a checkmark under «Released» the employee can manage the data for the respective contracts.
- Close the allocation of user rights by clicking on «Save».

The screenshot displays the AXA user interface for managing user rights. At the top, there is a navigation bar with 'Access overview', 'Administrator', 'Contact', 'EN', and 'SIGN OUT'. Below this is a secondary menu with 'CONTRACTS', 'DOCUMENTS', 'CLAIMS', 'CUSTOMER DATA', and 'RIGHTS AND POWERS OF ATTORNEY'. The main content area features a 'User right' modal window. Inside this modal, there is a 'User' section with a profile card showing a role of 'Authorized person', status of 'active', and a redacted email address. Below this is a 'User right' section with two entries: 'Personal insurance "Professional"' (Status: In force, Released checkbox checked) and 'Property insurance "Professional"' (Status: In force, Released checkbox unchecked). At the bottom of the modal are 'CANCEL' and 'SAVE' buttons. The footer contains 'AXA & YOU', 'AXA.ch', 'Contact & FAQ', and a footer bar with 'Conditions of use | Data protection | AXA Switzerland © 2016'.



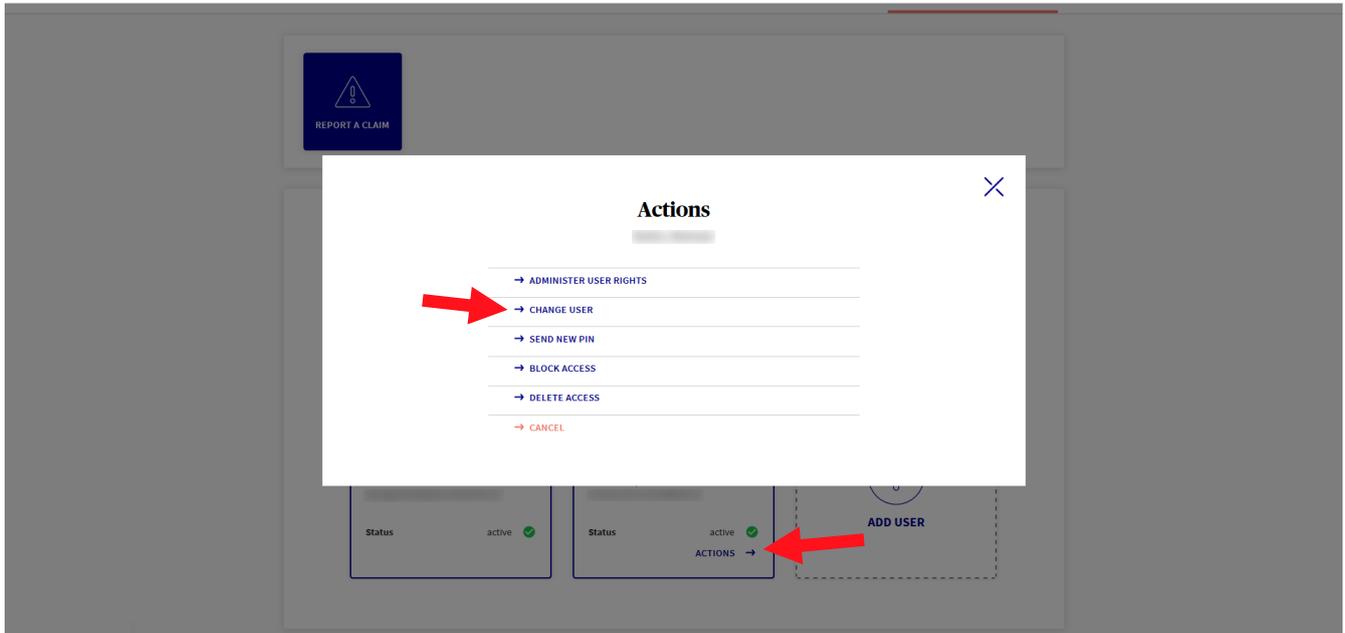
- If the activation information has not been received or is lost, you can resubmit it at any time.
- On the line with the relevant person's name, click on «Actions» and select «Send activation information».





3. Carry out personnel changes

- Do you want to enter a personnel change? If so, on the line with the relevant person's name, click on «Actions» and select «Change user». You can then carry out the personnel change.





4. Delete user rights

- Do you want to delete an authorized person's access?
- If so, in the drop-down menu with the relevant person's name, click on «Actions» and select «Delete access».

