



Instructions for private clients

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

Would you like to give a trusted person a power of attorney over your access rights 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».

The screenshot displays the 'Access overview' section of the myAXA client portal. At the top, there is a navigation bar with 'Select access', a user profile icon, 'Contact', 'EN', and 'SIGN OUT'. Below this, the 'Access overview' title is centered. The main content area contains three tiles. The first tile, 'Authorized person', shows a status of 'active' with a green checkmark and a 'DETAILS' link. The second tile, 'Private customer', also shows a status of 'active' with a green checkmark and a 'DETAILS' link, which is highlighted by a red arrow. A red notification badge is present in the top right corner of this tile. To the right of these tiles is a dashed box containing a plus sign icon and the text 'ADD ACCESS'. The footer of the page includes '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 the «Rights & powers of attorney» tab.

The screenshot shows the myAXA client portal interface. At the top, there is a navigation bar with the AXA logo on the left and several menu items on the right: "Access overview", "Private customer" (with a dropdown arrow), "Contact", "EN" (with a dropdown arrow), and "SIGN OUT". Below this is a secondary navigation bar with the following tabs: "HOME" (with a notification icon), "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 on the left and a "Messages" section on the right. The "Messages" section contains two entries, each with a date, a claim report icon, the text "Claim Report: Household Damage and Loss", a reference number, and the state "State: completed". Each entry has a "VIEW CLAIM DETAILS" button. Below the messages is a "CAR FOR YOU" banner with the text "calculate the current market value of your car" and a "PROFIT NOW" button. The footer contains the text "AXA & YOU", "AXA.ch", "Contact & FAQ", and "DE | FR | IT | EN". On the right side of the footer, it says "Conditions of use | Data protection | AXA Switzerland © 2016".



- Click on «Add user».

The screenshot displays the AXA myAXA 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', 'Private customer', 'Contact', 'EN', and 'SIGN OUT'. Below this is a secondary navigation bar with 'HOME', '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 an information bar with the text 'How to administer your users on the myAXA client portal: DOWNLOAD THE INSTRUCTIONS'. Below this, there is a user profile card for a 'Private customer' with a status of 'active'. To the right of the profile card is a dashed box containing a plus sign icon and the text 'ADD USER', which is highlighted by a red arrow.



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

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', 'Private customer', a user icon, 'Contact', 'EN', and 'SIGN OUT'. Below this is a secondary navigation bar with 'HOME', '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. The modal has a progress bar with four steps: 'IDENTIFICATION DETAILS' (active), 'USER DETAILS', 'USER RIGHT', and 'DATA SAVED'. Under 'Identification details', there are two required fields: 'Email address *' and 'Date of birth *'. The 'Date of birth' field includes a calendar icon. At the bottom of the modal are two buttons: 'CANCEL' and 'CONTINUE'. The footer of the page is dark blue and contains the text 'AXA & YOU', 'AXA.ch', 'Contact & FAQ', and 'DE | FR | IT | EN'. On the right side of the footer, it says 'Conditions of use | Data protection | AXA Switzerland © 2016'.



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

← Access overview Private customer Contact EN SIGN OUT

HOME 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 *

AXA & YOU
AXA.ch Contact & FAQ

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



- 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».

AXA

Access overview Private customer Contact EN SIGN OUT

HOME 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

Date of birth

User account

Email address

BACK CONTINUE

AXA & YOU

AXA.ch Contact & FAQ

DE | FR | IT | EN

Conditions of use | Data protection AXA Switzerland © 2016



- You will now see which contracts are subject to the power of attorney. The power of attorney applies to the entire insurance portfolio, including contracts concluded in the future.
- Click on «Save» to confirm the acquisition.

AXA & YOU

AXA.ch Contact & FAQ

DE | FR | IT | EN

Conditions of use | Data protection AXA Switzerland © 2016



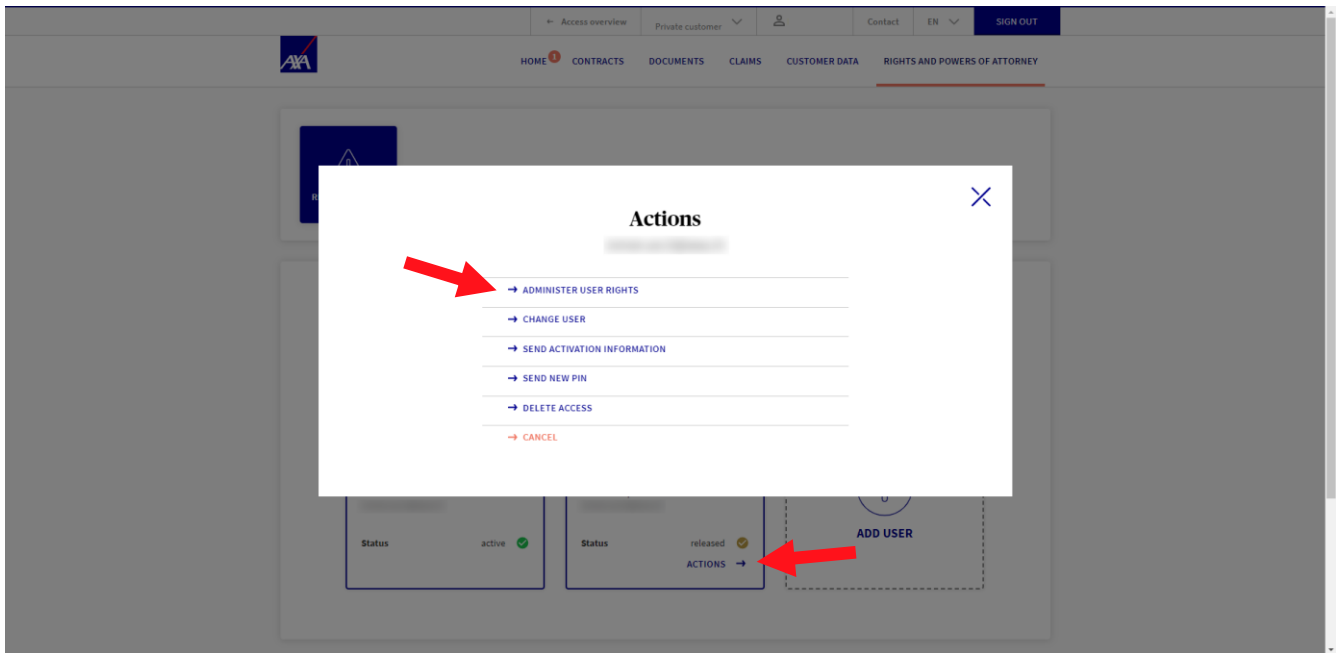
- You have successfully created the power of attorney.
- The activation information was automatically sent to the user via email.

The screenshot displays the AXA client portal interface. At the top, there is a navigation bar with the AXA logo on the left and several menu items: 'Access overview', 'Private customer', 'Contact', 'EN', and 'SIGN OUT'. Below this is a secondary navigation bar with 'HOME', '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. The modal has a green background with a white checkmark icon and the text: 'The user was successfully created. The activation information was sent to the email address [redacted]'. Below the green section, 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', 'AXA.ch', 'Contact & FAQ', and 'DE | FR | IT | EN' on the left, and 'Conditions of use | Data protection | AXA Switzerland © 2016' on the right.



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 «Administer user rights».






- The various contracts are listed. The power of attorney applies to the entire insurance portfolio, including future contracts.
- You can revert to the user overview by clicking on «Cancel» or «Save».

← Access overview Private customer Contact EN SIGN OUT

HOME CONTRACTS DOCUMENTS CLAIMS CUSTOMER DATA RIGHTS AND POWERS OF ATTORNEY


User right





User

 [Redacted]

Role Authorized person
Status released
Email address [Redacted]

User right

 The power of attorney applies to the entire insurance portfolio, including contracts concluded in the future.

	Household insurance [Redacted]	Status: In force
	Personal legal protection insurance [Redacted]	Status: In force
	Protect Plan [Redacted]	Status: In force
	Travel insurance INTERTOURS [Redacted]	Status: In force

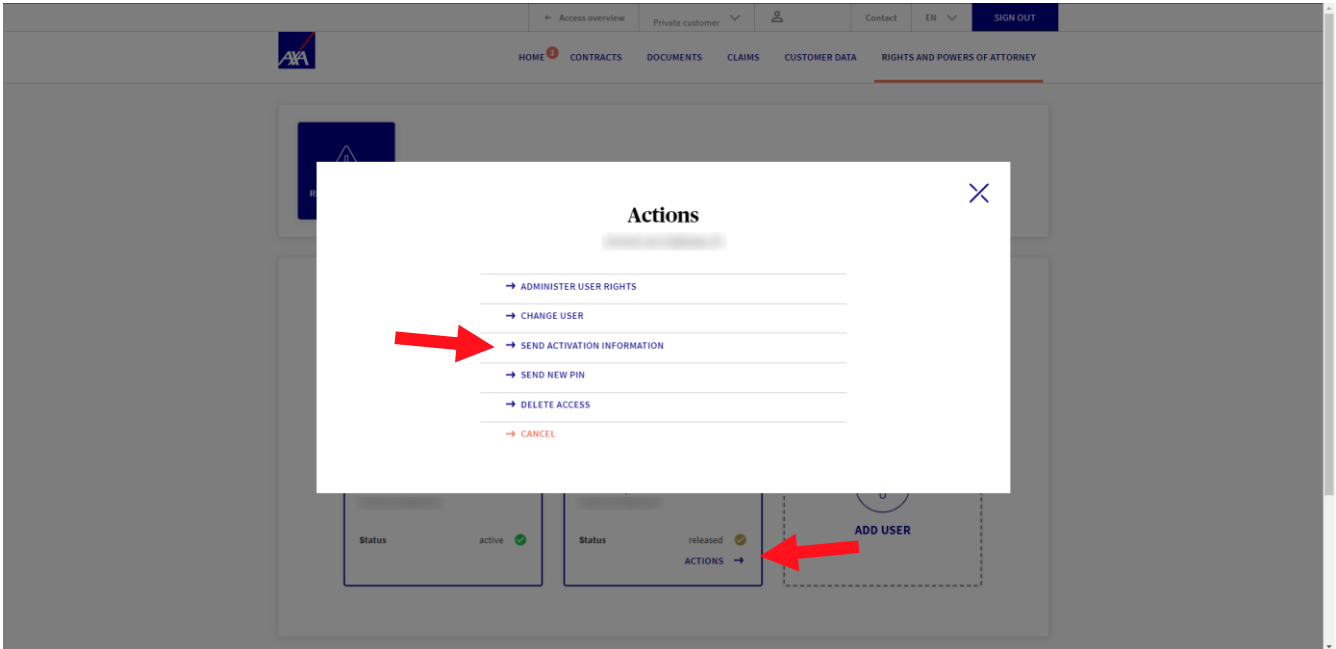
CANCEL SAVE

AXA & YOU
AXA.ch Contact & FAQ

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



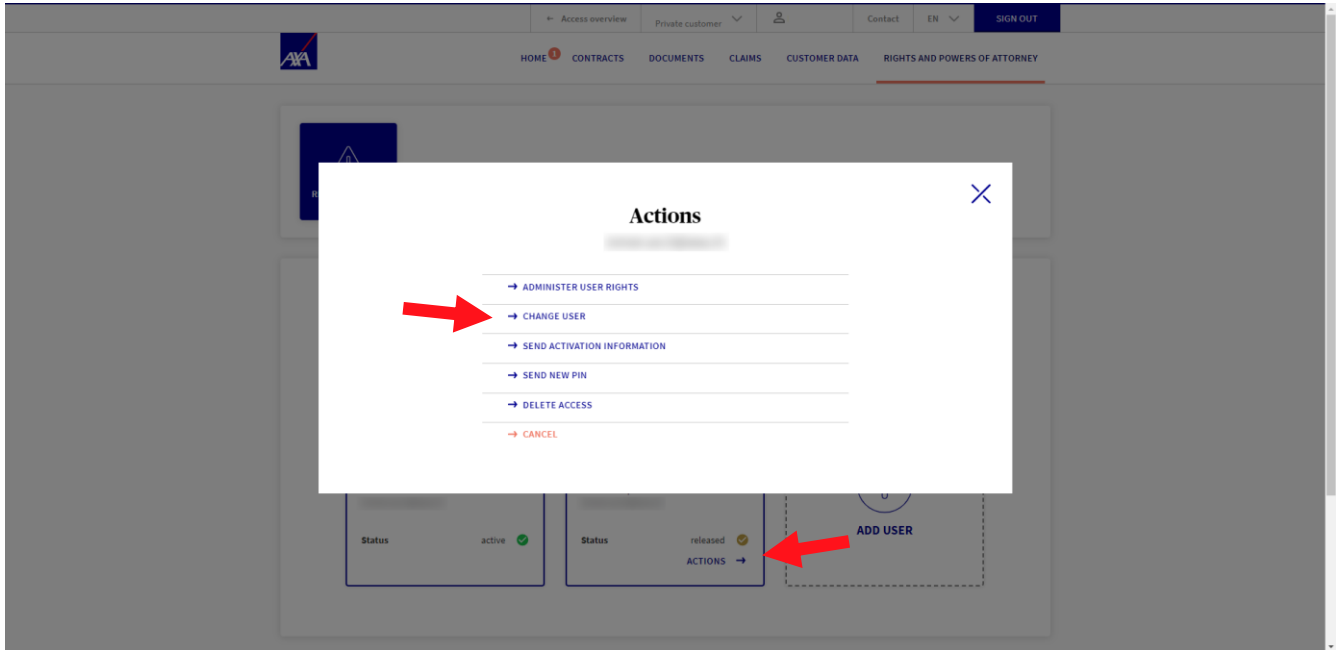
- If the activation information has not been received or is lost, you can resubmit it at any time. On the line with the relevant person's name, click on «Actions» and select «Send activation information».





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».

