



# How to administer authorized users on the myAXA client portal

Instructions for private clients

# Contents

1. Entering authorized users	3
2. Manage user rights	11
3. Carry out personnel changes	14
4. Delete user rights	15

# 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' interface. At the top, there is a navigation bar with the AXA logo, a 'Select access' dropdown, a user profile icon, 'Contact', 'EN' dropdown, and a 'SIGN OUT' button. Below the navigation bar, the title 'Access overview' is prominently displayed. Underneath the title, there is a '+ ADD ACCESS' link and a grid icon. The main content area features two access tiles. The first tile is for a 'Private customer' and the second is for an 'Administrator'. Both tiles show a 'Status active' indicator and two buttons: 'ACTIONS' and 'DETAILS'. A large red arrow points to the 'DETAILS' button of the 'Private customer' tile. To the right of these tiles is a large grey button with a plus sign and the text 'ADD ACCESS'. At the bottom of the page, there is a blue footer bar containing the text 'AXA & YOU', 'AXA.ch', 'Contact & FAQ', and 'Conditions of use | Data protection | © 2018 AXA Insurance Ltd.'

- Click on the “Rights & powers of attorney” tab.

The screenshot shows the AXA website 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 (with a dropdown arrow), Contact, EN (with a dropdown arrow), and SIGN OUT. Below this is a secondary navigation bar with tabs: HOME, CONTRACTS (highlighted with an orange underline), 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 is titled 'Contracts' and includes filter buttons for 'All products', 'All statuses', 'Policy number', and a 'RESET FILTER' button. A card for 'Life insurance WinLifeSave' is displayed, showing a policy number and status 'In force', with 'SERVICES' and 'DETAILS' buttons. Below this is a section titled 'Take out new insurance via your advisor or directly online' with a grid of insurance options: CAR INSURANCE, MOTORCYCLE INSURANCE, HOUSEHOLD CONTENTS INSURANCE, SUPPLEMENTARY HEALTH INSURANCE, PERSONAL LIABILITY INSURANCE, RENTAL DEPOSIT, HOUSEHOLD INSURANCE, LIFE INSURANCE, TRAVEL INSURANCE, LEGAL PROTECTION INSURANCE, INSURANCE FOR DOMESTIC STAFF, and MORTGAGES. At the bottom, there are three promotional cards: 'ONLINE LEGAL PORTAL MYRIGHT.CH (IN GERMAN)', 'HOME PROTECTION - SMART HOME DEVICES WITH 20% DISCOUNT', and 'HOTELCARD - THE HALF-PRICE FOR HOTELS WITH 25% DISCOUNT'. The footer contains 'AXA & YOU', 'AXA.ch', 'Contact & FAQ', and 'Conditions of use | Data protection | © 2018 AXA Insurance Ltd.'

- Click on “Add user”.

AXA

← Access overview Private customer Contact EN SIGNED OUT

HOME CONTRACTS DOCUMENTS CLAIMS CUSTOMER DATA RIGHTS AND POWERS OF ATTORNEY

## Rights and powers of attorney

How to administer your users on the myAXA client portal: Download the instructions

+ ADD USER

All roles All statuses RESET FILTER

Role	Private customer
Status	active
Email address	

NO ACTIONS AVAILABLE

+ ADD USER



AXA & YOU


AXA.ch

Contact & FAQ


Conditions of use | Data protection | © 2018 AXA Insurance Ltd.

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

← Access overview Private customer  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  Data saved

### Identification details

Email address\*

Date of birth\*

**AXA & YOU**

AXA.ch

Contact & FAQ

Conditions of use | Data protection | © 2018 AXA Insurance Ltd.

- User not yet available?
- Fill in all fields marked with \*.
- Click on “Continue”.

# Enter user



**Personal details**

**Title\***

**First name\***

**Last name\***

**Date of birth** 01.01.1990

**Correspondence language\***

---

**User account**

**Email address** person@radom.com

**Phone number\***

**TAN type\***

BACK

CANCEL


CONTINUE

**AXA & YOU**

AXA.ch

Contact & FAQ


- 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".



← Access overview | Private customer | Contact | EN | SIGN OUT

HOME | CONTRACTS | DOCUMENTS | CLAIMS | CUSTOMER DATA | RIGHTS AND POWERS OF ATTORNEY

## Enter user



**Personal details**

Date of birth [...]

**User account**

Email address [...]

BACK
CONTINUE

CANCEL

**AXA & YOU**

AXA.ch

Contact & FAQ

Conditions of use | Data protection | © 2019 AXA Insurance Ltd.



- 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 “Continue” to confirm the acquisition.

[← 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

i

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

WinLifeSave

✓ In force

CONTINUE


AXA & YOU

AXA.ch

Contact & FAQ


[Conditions of use](#) | [Data protection](#) | © 2018 AXA Insurance Ltd.


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

← 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  Data saved



The user was successfully created.  
The activation information was sent to the email address

 **USER OVERVIEW**

 **ADD NEW USER**

**AXA & YOU**

AXA.ch  
Contact & FAQ

Conditions of use | Data protection | © 2018 AXA Insurance Ltd.

## 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 screenshot displays the AXA client portal 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 secondary navigation bar with links for HOME, CONTRACTS, DOCUMENTS, CLAIMS, CUSTOMER DATA, and RIGHTS AND POWERS OF ATTORNEY. The main heading is 'Rights and powers of attorney'. A sub-heading reads 'How to administer your users on the myAXA client port...'. There is an '+ ADD USER' button and two dropdown menus for 'All roles' and 'All statuses'. A table lists user information with columns for 'Role', 'Status', and 'Email address'. The 'Status' column shows 'released'. Below the table is an 'ACTIONS' button with a plus sign. A modal window titled 'Actions' is open, listing several options: 'ADMINISTER USER RIGHTS' (highlighted in blue), 'CHANGE USER', 'SEND ACTIVATION INFORMATION', 'SEND NEW PIN', 'BLOCK / UNBLOCK ACCESS', and 'DELETE ACCESS'. A 'CANCEL' button is at the bottom of the modal. A red arrow points from the 'ACTIONS' button in the table to the 'ADMINISTER USER RIGHTS' option in the modal. Another red arrow points from the right side of the screen to the 'ADMINISTER USER RIGHTS' option. The footer contains 'AXA & YOU', 'AXA.ch', 'Contact & FAQ', and 'Conditions of use | Data protection | © 2018 AXA Insurance Ltd.'.

- 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”.

The screenshot shows the AXA user interface for managing user rights. At the top, there is a navigation bar with the AXA logo, a breadcrumb trail (Access overview > Private customer), a user profile icon, and a 'SIGN OUT' button. Below the navigation bar is a menu with options: HOME, CONTRACTS, DOCUMENTS, CLAIMS, CUSTOMER DATA, and RIGHTS AND POWERS OF ATTORNEY.

## User right

An information box states: "The power of attorney applies to the entire insurance portfolio, including contracts concluded in the future." A red flag icon is visible on the right side of this box.

	WinLifeSave
	In force

Role	Authorized person
Status	released
Email address	

At the bottom of the main content area, there are two buttons: "CANCEL" and "SAVE".

The footer contains the following text:

AXA & YOU  
 AXA.ch  
 Contact & FAQ

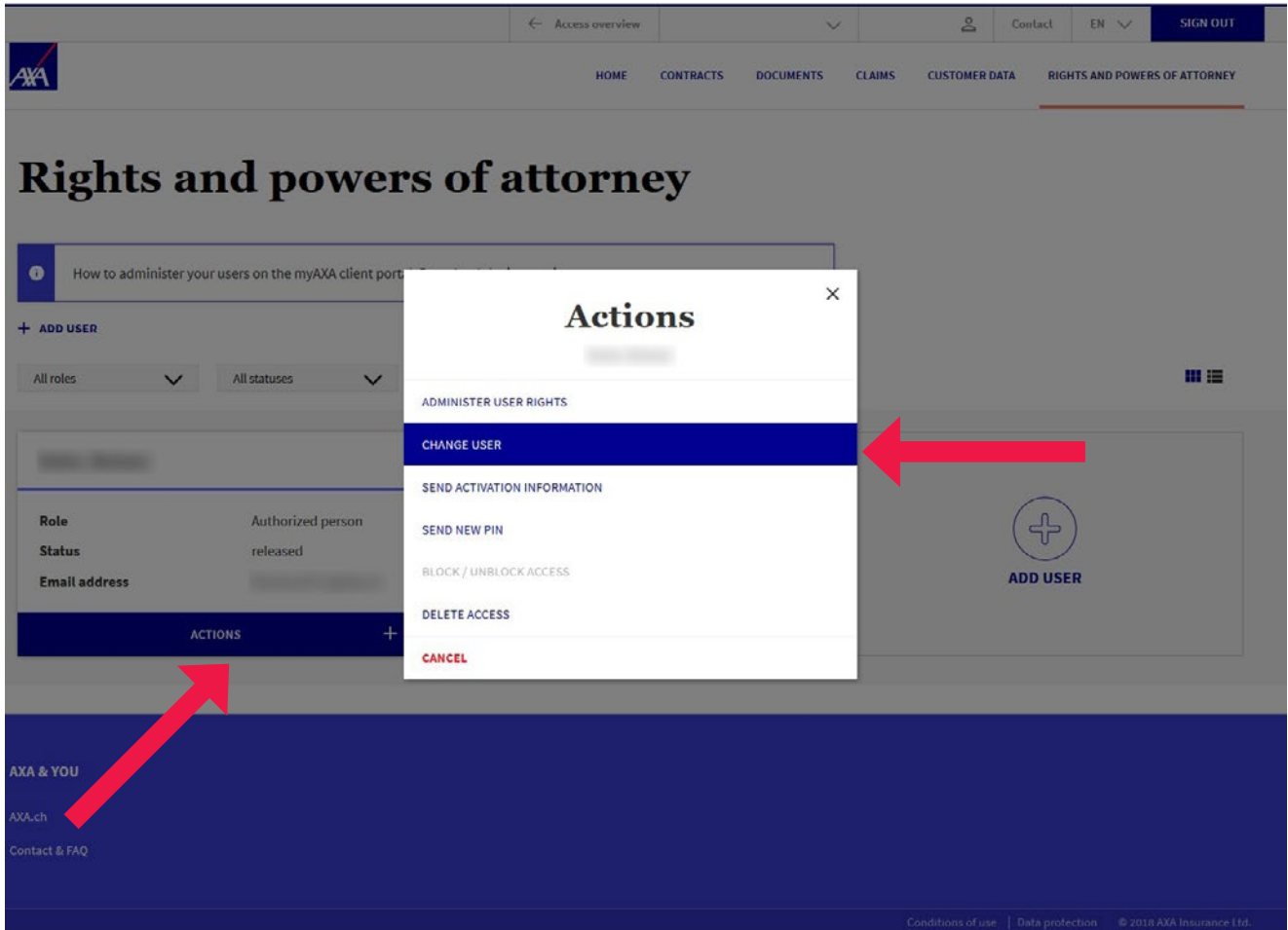
Conditions of use | Data protection | © 2018 AXA Insurance Ltd.

- 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".

The screenshot shows the AXA user management interface for "Rights and powers of attorney". A table lists users with columns for Role, Status, and Email address. The "Status" column shows "released". Below the table is an "ACTIONS" button. A modal window titled "Actions" is open, displaying a list of actions: ADMINISTER USER RIGHTS, CHANGE USER, SEND ACTIVATION INFORMATION (highlighted), SEND NEW PIN, BLOCK / UNBLOCK ACCESS, DELETE ACCESS, and CANCEL. A red arrow points from the "ACTIONS" button in the table to the modal. Another red arrow points from the "SEND ACTIVATION INFORMATION" option in the modal to the "ADD USER" button in the background.

### 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".

The screenshot displays the AXA myAXA client portal interface. At the top, there is a navigation bar with the AXA logo, a search bar, and links for 'HOME', 'CONTRACTS', 'DOCUMENTS', 'CLAIMS', 'CUSTOMER DATA', and 'RIGHTS AND POWERS OF ATTORNEY'. The main heading is 'Rights and powers of attorney'. Below this, there is a section for 'How to administer your users on the myAXA client portal' with an 'ADD USER' button. A table lists user details, including 'Role', 'Status', and 'Email address'. The 'Status' column shows 'released'. Below the table is an 'ACTIONS' button. A modal window titled 'Actions' is open, showing a list of actions: 'ADMINISTER USER RIGHTS', 'CHANGE USER', 'SEND ACTIVATION INFORMATION', 'SEND NEW PIN', 'BLOCK / UNBLOCK ACCESS', 'DELETE ACCESS', and 'CANCEL'. The 'DELETE ACCESS' option is highlighted in blue. A red arrow points to the 'ACTIONS' button in the table, and another red arrow points to the 'DELETE ACCESS' option in the modal.