

How to administer authorized users on the myAXA client portal /

Instructions for administrators



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1. Entering authorized users /

Are you an administrator and would like to provide employees with access to myAXA? If so, then please proceed as follows:

- Select the „Portal administration“ tab.
- Click on „Add user“ at the bottom of the screen.
- Be sure to complete the fields that are marked with an asterisk.

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Portal administration

i How to administer your user rights on the myAXA client portal: [Download the instructions](#)

Contract for portal access

Contract number 1.000.165 Status **activ**
Contact person Kontakt, Firma

User of the contract

All roles All statuses Search for names [Reset filter](#)

[+ Add user](#)

Administrator, Firma		Mitarbeiter 1, Firma	
Role	Administrator	Role	Employee
Status	activ	Status	activ
Email address	Admin@Firma.ch	Email address	Mitarbeiter1@Firma.ch
No actions available		Action	+

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Important:

- If the person you entered has a landline, select the «VoicetAN» option under «Phone number for TAN». A computer will then read the login code over the phone.
- If the person you entered has a mobile phone, choose the „mTAN“ option so that he or she will receive an SMS with the login code.

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Add user

Accept data of contact person

Personal data

Gender*
 Male Female

Last name*
Mitarbeiter 2

First name*
Firma

Date of birth*
01.01.1990

Phone number for calls*
+41 79 567 88 99

Role
Employee

Correspondence language
german

PIN N/A

Status created

Contact details

Phone number* +41 79 567 88 99 **TAN type** mTAN (SMS code)

Email address*
Mitarbeiter2@Firma.ch

Address data

Address is different from company address
 yes no

Company*

Street*

no.

Postcode*
8490

Place*

Country*
Switzerland

[Cancel](#) [Save](#)

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Complete this step by clicking on «Save».

2. Activating authorized users and allocating the rights /

You can allocate different user rights to employees who have been entered: Click on the „Actions“ drop-down menu in the line of the respective person and select „Administer user rights“.

The screenshot displays the 'Portal administration' interface for AXA Winterthur. At the top, there is a navigation bar with 'Welcome to myAXA', 'Contact', 'EN', and 'Sign Out'. Below this, the 'winterthur' logo is on the left, and 'Contracts', 'Document storage', and 'Portal administration' are on the right. The main heading is 'Portal administration'. An information box provides instructions on how to administer user rights, with a link to 'Download the instructions'. The main content area is titled 'Contract for portal access' and shows contract details: 'Contract number 1.000.165', 'Status activ', and 'Contact person Kontakt, Firma'. Below this, the 'User of the contract' section has filters for 'All roles' and 'All statuses'. A '+ Add user' button is present. The user list is divided into three columns: 'Administrator, Firma', 'Mitarbeiter 1, Firma', and 'Mitarbeiter 2, Firma'. Each user entry shows their role, status, and email address. Below each entry is an 'Action' button with a plus sign. A dropdown menu is open over the 'Mitarbeiter 2, Firma' entry, listing the following actions: 'Administer user rights', 'Change user', 'Send activation information', 'Send new PIN', 'Block / unblock user', 'Delete user', and 'Cancel'.

Contract for portal access	
Contract number	1.000.165
Status	activ
Contact person	Kontakt, Firma

User of the contract	
All roles	▼
All statuses	▼
+ Add user	

Administrator, Firma	
Role	Administrator
Status	activ
Email address	Admin@Firma.ch
No actions available	

Mitarbeiter 1, Firma	
Role	Employee
Status	activ
Email address	Mitarbeiter1@Firma.ch
Action	+

Mitarbeiter 2, Firma	
Role	Employee
Status	created
Email address	Mitarbeiter2@Firma.ch
Action	+

The page will change automatically to the following view:

The screenshot displays the 'User right' configuration interface. At the top, there is a navigation bar with 'Welcome to myAXA', 'Contact', 'EN', and 'Sign Out'. Below this is the 'winterthur' logo and navigation links for 'Contracts', 'Document storage', and 'Portal administration'. The main heading is 'User right'. A 'Release all contracts' section has 'On' and 'Off' buttons. The main content area lists three contracts, each with a 'Release' checkbox (currently 'Off') and a 'Not released' status. The sidebar on the right shows user details for 'Mitarbeiter 2, Firma', including 'Role: Employee', 'Status: released', and 'Email address: Mitarbeiter2@Firma.ch'. At the bottom, there are 'Cancel' and 'Save' buttons.

Contract Name	Status	Release	Not released
Customer and visitor accident insurance	In force	Off	Not released
Occupational benefits insurance	In force	Off	Not released
Occupational benefits insurance	In force	Off	Not released

Mitarbeiter 2, Firma	
Role	Employee
Status	released
Email address	Mitarbeiter2@Firma.ch

Here you will see a list of the different contracts. Placing a tick below „Release“ enables the person to administer the data for the respective contracts.

The following screenshot shows what the screen looks like when the employee benefits contract has been released.

Welcome to myAXA | Contact | EN | Sign Out

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User right

Release all contracts On Off

Icon	Contract Name	Status	Toggle	Release Status
	Customer and visitor accident insurance	✓ In force	<input checked="" type="checkbox"/> On <input type="checkbox"/> Off	Released
	Occupational benefits insurance	✓ In force	<input type="checkbox"/> On <input checked="" type="checkbox"/> Off	Not released
	Occupational benefits insurance	✓ In force	<input checked="" type="checkbox"/> On <input type="checkbox"/> Off	Released

Mitarbeiter 2, Firma

Role	Employee
Status	released
Email address	Mitarbeiter2@Firma.ch

Click on „Save“ to finish allocating the administration rights.

Action
Mitarbeiter 2, Firma
Administer user rights
Change user
Send activation information
Send new PIN
Block / unblock user
Delete user
Cancel

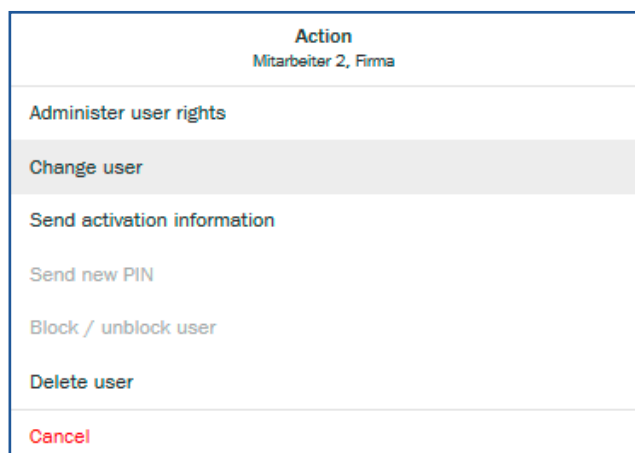
You then need to send the activation information to the person you have entered so that he or she can log in and set a password. To do so, open the «Actions» drop-down menu and select «Send activation information».

The person that has been entered then automatically receives a notice with the activation information. The action is confirmed with the „Activation information sent“ message, which appears in the space right below the tabs.

The screenshot displays the 'Portal administration' section of the myAXA client portal. At the top, a navigation bar includes 'Welcome to myAXA Kuhn Rikon AG', 'Contact', 'EN', and a 'Sign Out' button. The 'winterthur' logo is on the left, and 'Contracts', 'Document storage', and 'Portal administration' are on the right. The main heading is 'Portal administration'. Below it, an information box with an 'i' icon states: 'How to administer your user rights on the myAXA client portal: [Download the instructions](#)'. A green confirmation box with a checkmark says: 'Activation information has been sent'. Under the heading 'Contract for portal access', the details are: 'Contract number 1.000.043 Status activ' and 'Contact person Firma, Kontaktperson'. The 'User of the contract' section features filters: 'All roles', 'All statuses', a search input 'Search for names', and a 'Reset filter' button.

3. Carry out personnel changes /

Do you want to enter a personnel change? If so, click on the „Actions“ drop-down menu in the line of the respective person and select „Change user“. You can then carry out the personnel change.



4. Delete user rights /

Do you want to delete user rights? If so, click on the „Actions“ drop-down menu in the line of the respective person and select „Delete user“.

