



VERSION 1.0

Allianz Employer Portal Manual

Allianz Employer Portal Manual

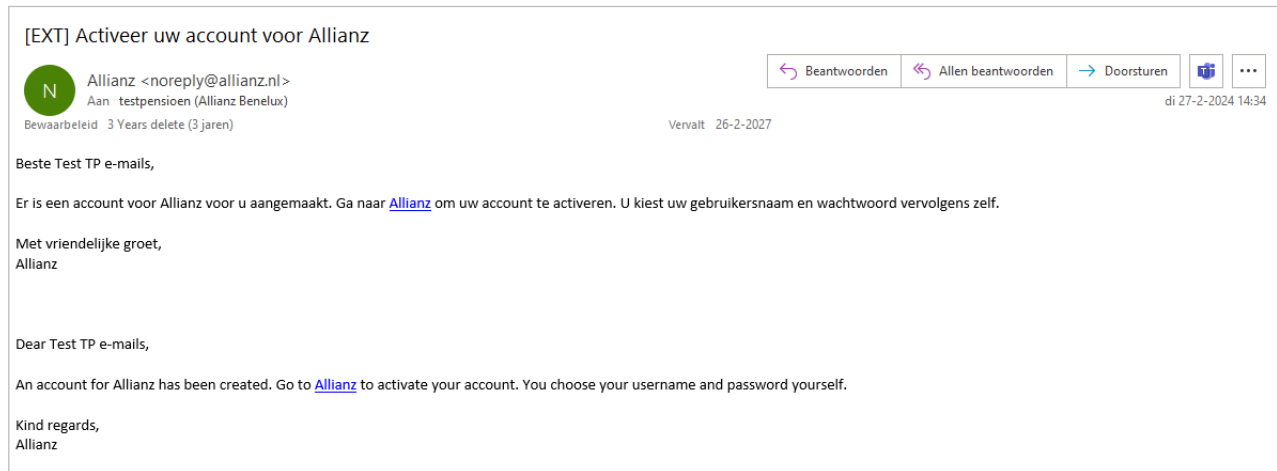
Table of Contents

1	Logging into the Employer Portal	3
2	Creating Accounts	6
2.1	User Management Role	6
2.2	HR Role	6
2.3	Finance Role	6
3	Adjusting Settings	7
3.1	Language Settings	7
3.2	Dark/Light Mode	7
3.3	Logging Out	7
4	Viewing Participants (BOLD)	7
4.1	Viewing Participants	7
4.2	Editing Participants	7
4.2.1	Adjusting Salary and/or Part-Time Percentage	7
4.2.2	Termination	8
4.2.3	Adding Partner/Child	8
4.2.4	Exporting Participant File	9
4.3	Registering a New Participant	9
4.4	Collective Changes	9
4.4.1	Salary and Part-Time Percentage	9
4.4.2	Registering New Participants	10
4.5	Submitted Changes	10
5	Documents	11
5.1	Financial Documents	11
5.2	Legal Documents	11
6	Adjusting Contact Details	11
6.1	My Details	11
6.2	My Company	12
6.3	My Advisor	12
7	Pension Plan	12
8	Service & Contact	12
9	Do You Have a Good Idea?	13
10	Future Updates in This Manual	13

1 Logging into the Employer Portal

- Once an account is created for you, you will receive a notification email prompting you to activate your account.

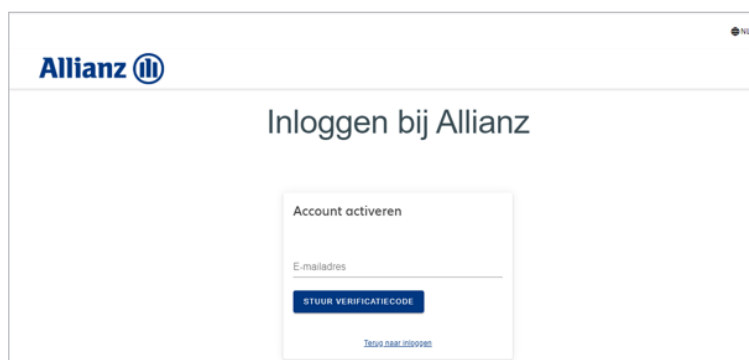
Example:



- After clicking on the text 'Allianz,' you will be directed to the following page, where you click on 'First Visit? Activate Your Account.'

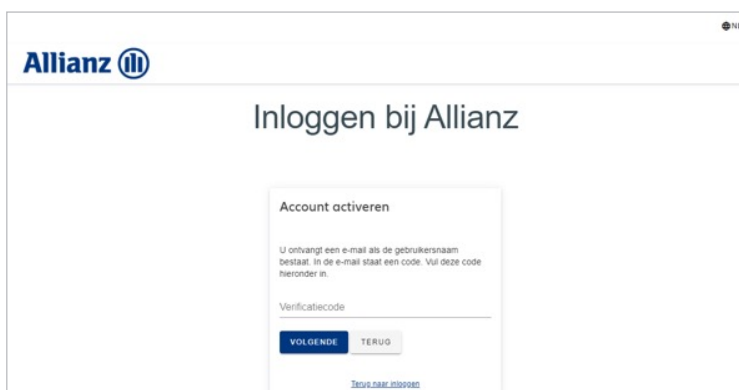
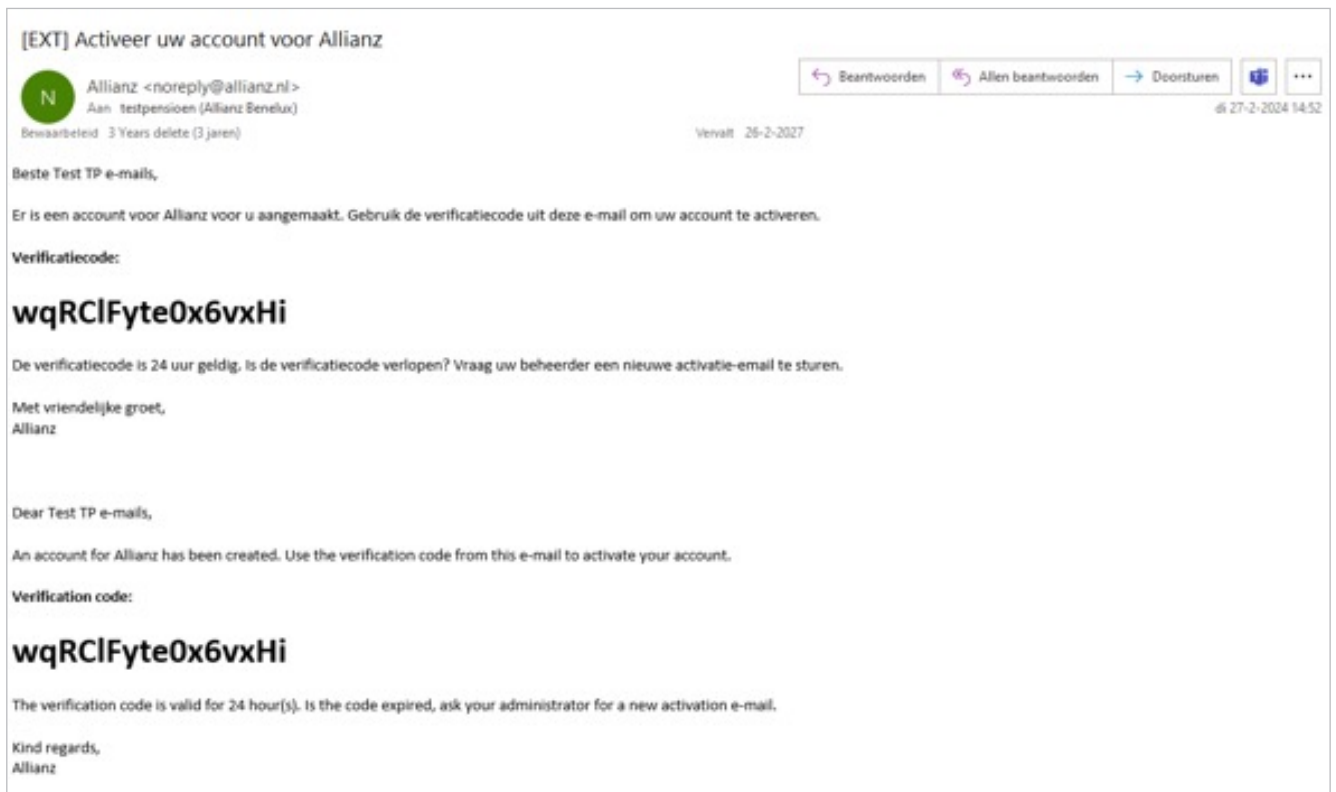


- On the next screen, enter your email address and press the 'Send Verification Code' button.

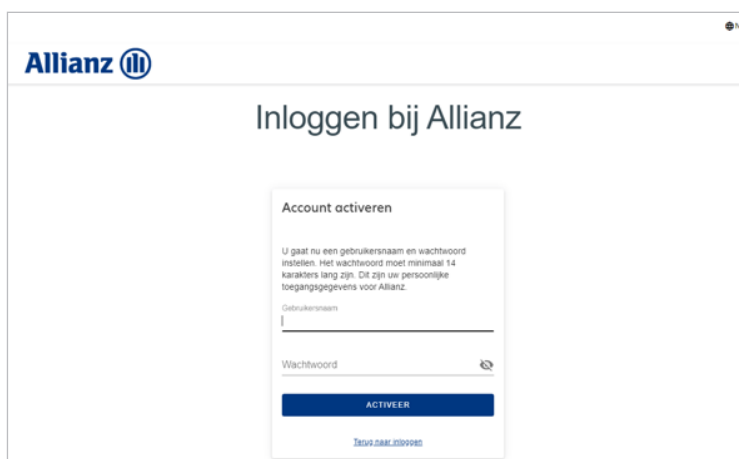


- You will receive a second email containing a verification code. Enter this code in the relevant field.

Example:



- Create a username and password yourself and activate your account.



- You will receive a third email confirming that your account has been activated.
- Enter your username and password on the login screen.

Inloggen bij Allianz

Gebruikersnaam
[Redacted]

Wachtwoord [Redacted] 

[Gebruikersnaam vergeten?](#)
[Wachtwoord vergeten?](#)

INLOGGEN >

[Eerste bezoek? Activeer uw account](#)

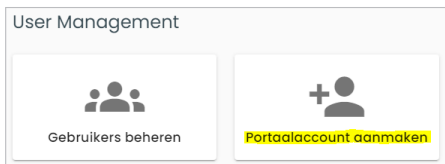
- After logging in, a screen for 2FA verification will appear. Use an authenticator to scan the QR code, and log in with the generated code.



Tips & Tricks:

- You can use an authenticator such as Google Authenticator  or Microsoft Authenticator .
- The link to the employer portal is <https://werkgeversportaal.allianz.nl/login/>. Save it in your browser's favorites for easy access.

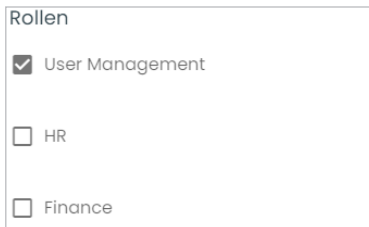
2 Creating Accounts



You can create accounts with different viewing and editing permissions. Via the menu 'Create Portal Account,' you can create a portal account for other users.

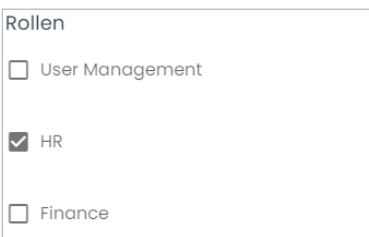
You can choose between the following roles:

2.1 User Management Role

A form titled 'Rollen' (Roles) with three checkboxes: 'User Management' (checked), 'HR' (unchecked), and 'Finance' (unchecked).

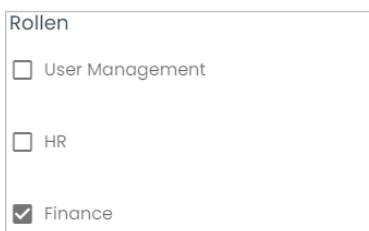
This role allows you to create new users.

2.2 HR Role

A form titled 'Rollen' (Roles) with three checkboxes: 'User Management' (unchecked), 'HR' (checked), and 'Finance' (unchecked).

With the HR role, the user can implement changes, export data, and view information regarding the pension plan and participants. This role does not allow access to financial documents.

2.3 Finance Role

A form titled 'Rollen' (Roles) with three checkboxes: 'User Management' (unchecked), 'HR' (unchecked), and 'Finance' (checked).

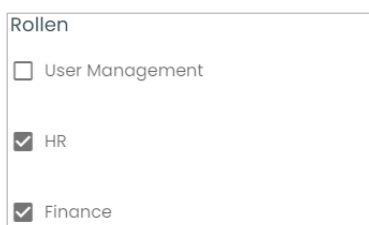
With this role, the user can only view financial documents and pension plan details. Changes cannot be made, except for the user's and company's contact details.



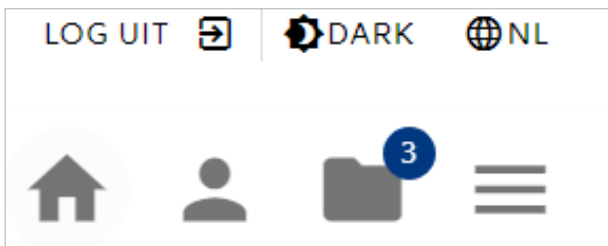
Tips & Tricks:

- Don't see the option to create user accounts? You may not have the necessary permissions.
- You can combine multiple roles. For instance, you can create an account for a (new) user with both HR and Finance roles, granting all permissions under both roles.

Example:

A form titled 'Rollen' (Roles) with three checkboxes: 'User Management' (unchecked), 'HR' (checked), and 'Finance' (checked).

3 Adjusting Settings



3.1 Language Settings

On the main page, you can adjust the portal's language settings. The default language is Dutch, but you can switch to English. Click the globe icon to change the language.

3.2 Dark/Light Mode


The portal is set to 'light mode' by default, meaning the background is white. You can change it to 'dark mode,' which has a black background. Note: this feature is still under development.

3.3 Logging Out

Log out of the portal by clicking the button. LOG UIT .

4 Participant Overview

Deelnomenummer	Naam ↑	Datum in dienst	Volijdt salaris	Parttimepercentage	Status	Acties
3054268	Dijl, MF, van der	01-09-2023	€ 57.024,00	87,500%	Sloper	
3042021	Tigo, M, van	01-09-2022	€ 41.698,00	57,500%	Actief	

In the participant overview, you can see all participants under the selected plan(s). Click to refresh  the data, which may take a few moments to update.

4.1 Viewing Participants

2001681	Assob, G., ter	01-08-2019	€ 52.242,28	100,000%	Actief	
---------	----------------	------------	-------------	----------	--------	--

Use the 'eye icon' to view participant details, such as personal data, coverage, and employment details.



Tips & Tricks:

- Want to check the premium? Refer to the booking overview (under financial documents) or the export file.
- Participants can find their policy values in the participant portal.

4.2 Editing Participants

DEELNEMER OVERZICHT

INGEDIENDE WIJZIGINGEN COLLECTIEF

Terug

Details collectieve wijziging

Status	Verwerkt
Totaal ingediende wijzigingen	6
Aantal rekerende wijzigingen	0
Aantal goed verwerkt	6
Aantal geen mutatie (gegeven ongewijzigd)	0
Aantal niet goed verwerkt (foutmelding(en) in Excel bestand)	0
Aantal niet goed verwerkt (foutmelding(en) uit administratie)	0

Niet goed verwerkt

Er zijn geen foutmelding(en) in het Excel bestand geconstateerd.

Aantal niet goed verwerkt (foutmelding(en) in Excel bestand) (0)

Er zijn geen foutmelding(en) in het Excel bestand geconstateerd.

Aantal niet goed verwerkt (foutmelding(en) uit administratie) (0)

Er zijn geen foutmelding(en) vanuit de administratie geconstateerd.

- Changes cannot be made to participants with the status 'inactive.'

4.2.1 Adjusting Salary and/or Part-Time Percentage

Submit changes to salary and/or part-time percentage for individual participants.



Tips & Tricks:

- Salary changes can be submitted with an effective date up to three months in the future.

4.2.2 Termination of employee contract

Submit a termination for individual participants.



Tips & Tricks:

- Terminations can be submitted with an effective date up to three months in the future.
- The date format depends on your browser settings: English settings show mm/dd/yyyy, Dutch settings show dd/mm/yyyy.

4.2.3 Adding Partner/Child

Register a partner and/or child for individual participants. A BSN (citizen service number) is always required.



Tips & Tricks:

- Date format depends on your browser settings.

4.2.4 New ANW Gap Insurance Coverage

- Add voluntary ANW gap insurance coverage.

4.2.5 Exporting Participant File

Zoeken							
Deelnamenummer	Naam ↑	Datum in dienst	Volgtijd salaris	Parttimepercentage	Status	Acties	Exporteer medewerkers 

Download additional information about your employees participation in the pension plan. You can also select previously generated files from the export history.

4.3 Registering a New Participant

DEELNEMER OVERZICHT INGEDIENDE WIJZIGINGEN COLLECTIEF

DEELNEMERS



Exporteer medewerkers  NIEUWE DEELNEMER 

Gegevens opgehaald op 25-07-2024 14:08 

If multiple plans apply, select the appropriate pension plan. Complete all fields and enter the required details. You can then find the (new) participant in the participant overview and under the 'submitted individual changes' tab.

Tips & Tricks:

- Register new participants with an effective date up to three months in the future.
- Date format depends on browser settings.

4.4 Collective Changes

Submit collective changes for multiple participants, such as new registrations or salary/part-time percentage adjustments.

4.4.1 Salary and Part-Time Percentage

Specify the effective date of the collective change. Download the Excel file and fill in the new details in columns F and G. Upload the completed file to implement the changes.

Tips & Tricks:

- Collective changes take up to 24 hours to process. The status can be viewed under 'submitted collective changes.'

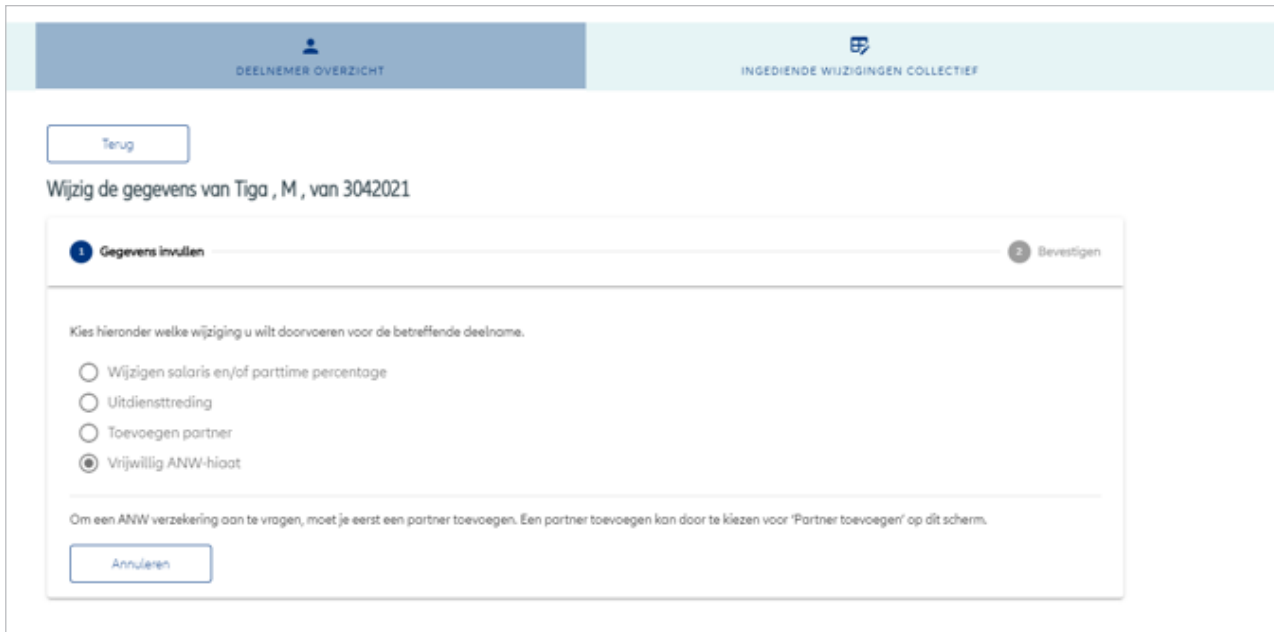
4.4.2 Registering New Participants

Download the input file, fill it out completely, and upload it. Effective dates can vary per participant.

Tips & Tricks:

- Register new participants collectively with effective dates up to three months in the past or future.
- Collective changes take up to 24 hours to process.

4.5 Submitted Changes



DEELNEMER OVERZICHT

INGEDIENDE WIJZIGINGEN COLLECTIEF

Terug

Wijzig de gegevens van Tiga, M, van 3042021

1 Gegevens invullen 2 Bevestigen

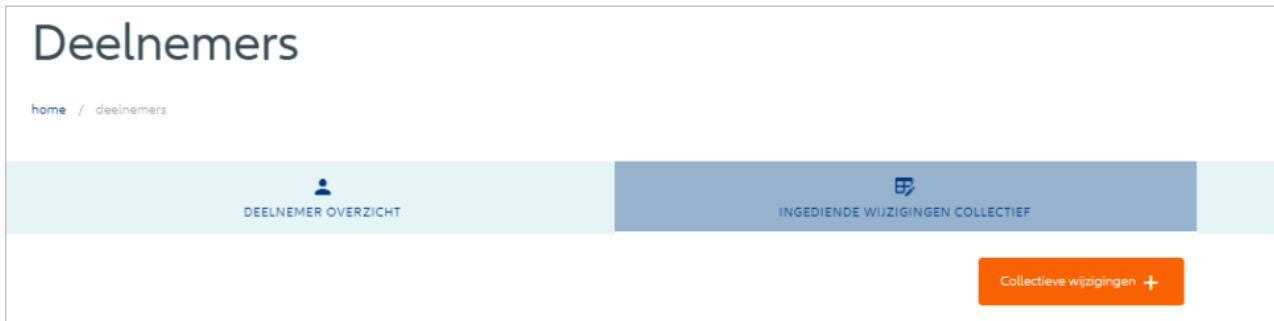
Kies hieronder welke wijziging u wilt doorvoeren voor de betreffende deelname.

- Wijzigen salaris en/of parttime percentage
- Uitdiensttreding
- Toevoegen partner
- Vrijwillig ANW-hiaat

Om een ANW verzekering aan te vragen, moet je eerst een partner toevoegen. Een partner toevoegen kan door te kiezen voor 'Partner toevoegen' op dit scherm.

Annuleren

View the latest processed change per participant, including changes requested or processed outside the portal.



Deelnemers

home / deelnemers

DEELNEMER OVERZICHT

INGEDIENDE WIJZIGINGEN COLLECTIEF

Collectieve wijzigingen +

Voorbeeld:

Op 10 oktober wordt een salariswijziging met terugwerkende kracht per 1 juni 2023 aangevraagd.

#	Wijziging	Wijzigingsdatum	Gewijzigd/ aangevraagd op
3	Salariswijziging	1 juni 2023	10 oktober 2023
2	Tussenpersoon wijziging	1 augustus 2023	2 augustus 2023
1	Nieuwe deelname	1 januari 2023	4 januari 2023

De tussenpersoon wijziging per 1 augustus 2023 zal ingehaald moeten worden.

#	Wijziging	Wijzigingsdatum	Gewijzigd/ aangevraagd op
3	Tussenpersoon wijziging	1 augustus 2023	2 augustus 2023
2	Salariswijziging	1 juni 2023	10 oktober 2023
1	Nieuwe deelname	1 januari 2023	4 januari 2023

Bij de ingediende wijzigingen zal de meest recente wijziging zichtbaar zijn. Uit bovenstaand voorbeeld zal dit 'tussenpersoon wijziging' zijn.

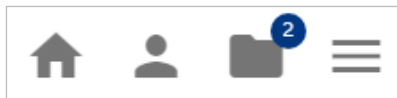
5 Documents

Documents related to the pension scheme are available in the Allianz Employer Portal. These are divided into legal and financial documents.

5.1 Financial Documents

Access financial documents related to the pension plan, such as invoices, booking overviews, and reminders.

5.2 Legal Documents



View legal documents related to the pension plan, such as the pension scheme, implementation agreement, and addenda.



Tips & Tricks:

- The unread marker disappears at the pension plan level once any user opens the document.

6 Adjusting Contact Details

In the portal, you can update your contact details yourself. You can do this on the main page via the 'Company' submenu. Click on 'Go to Profile' to edit various contact details.

6.1 My Details



Update the name and email address of the logged-in user via the 'My Details' tab.

6.2 My Company



Adjust the company's contact details and contact person. Only the postal address can be changed; for other changes, contact Allianz.

Tips & Tricks:

- You can only update the company's postal address. Please contact Allianz if any other details need to be updated.
- Do you want to change the email address for the current account notification email? If so, please contact Allianz.

6.3 My Advisor



View the contact details of the financial advisor. These cannot be edited directly; contact Allianz for changes.

7 Pension Plan



Via the tile on the main page or the hamburger menu, you can find the details, coverage, and specifics of the pension plan(s).

- Do you have multiple plans? Select the plan for which you want to view details.



Tips & Tricks:

- You cannot make plan changes through the portal. Contact Allianz if adjustments to the plan are required.
- Want to create an export file of all participants within the pension plan(s)? More information can be found in the chapter 'Exporting Participant File.'

8 Service & Contact

On the main page and via the hamburger menu, you can access the service & contact page. Here, you will find frequently asked questions and our contact details. Currently, information about the old employer portal is also available here.



Tips & Tricks:

- The page opens in a new tab in your web browser.
- Want to update contact details? More information can be found in the chapter 'Adjusting Contact Details.'

9 Do You Have a Good Idea?

Do you have a good idea or suggestion for improving the Allianz employer portal? We would love to hear from you! Please contact your Allianz representative.

10 Future Updates in This Manual

Not all functionalities have been developed and delivered yet. Once a (new) functionality is available in the portal, it will be described in this manual. The following functionalities will be delivered at a later stage:

- Voluntary ANW coverage;
- Policy documents;
- Holding structure;
- Voluntary savings coverage (already available in the participant portal).

Allianz Nederland Levensverzekering
is een onderdeel van Allianz Benelux N.V.

Coolsingel 120
Postbus 761, 3000 AT Rotterdam
Tel. 088 - 577 22 22

AFM-nummer 12042158
Inschrijfnummer KvK 59395435

www.allianz.nl