Claimity: Guide for expert end users of the platform

Vehicle expertise, experts, fraud investigation

This guide shows the end-to-end process in the Claimity portal from the experts' perspective. The three steps are always structured in the same way:

1) Acceptance and rejection of a request

2) Processing and submitting cases

3) Chat functions for queries

This guide also explains the processes for registering and logging in to the platform, how the platform is structured outside of case processing, and what reporting and viewing options are available.

Status: 13 January 2026

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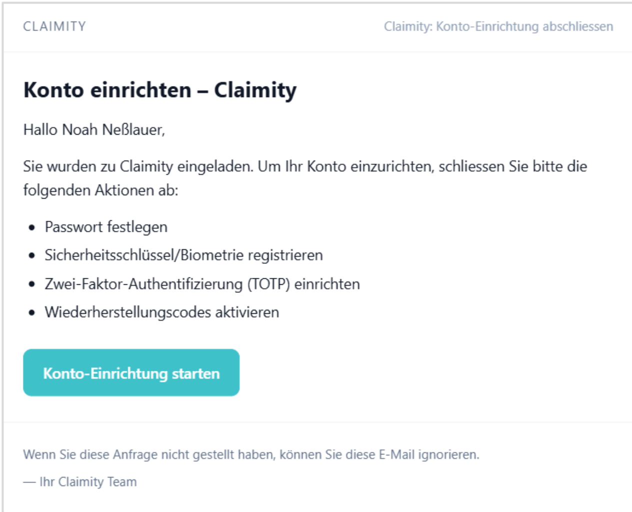
info@claimity.ch

1 Registration and login on app.claimity.ch

1.1 First-time registration on the platform

- Once you have been invited by an administrator from your organisation, you will receive an invitation email fromnoreply@claimity.ch with the following content:



CLAIMITY — Claimity: Konto-Einrichtung abschliessen

Konto einrichten – Claimity

Hallo Noah Neßlauer,

Sie wurden zu Claimity eingeladen. Um Ihr Konto einzurichten, schliessen Sie bitte die folgenden Aktionen ab:

- Passwort festlegen
- Sicherheitsschlüssel/Biometrie registrieren
- Zwei-Faktor-Authentifizierung (TOTP) einrichten
- Wiederherstellungscodes aktivieren

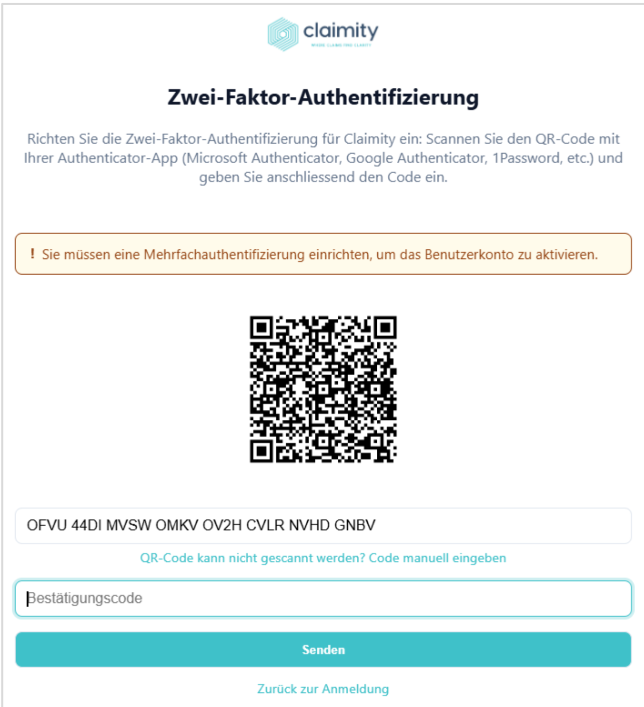
Konto-Einrichtung starten

Wenn Sie diese Anfrage nicht gestellt haben, können Sie diese E-Mail ignorieren.

— Ihr Claimity Team

- There, click on the "Start account setup" button.
  This will open a new tab where you will need to click on the link "Click here to continue".
- You will then be taken to a page asking you to change your password. Even if you have not yet created one, a password has been assigned to you in the background. Now create a password of your choice. For data security reasons, the following rules apply: **The password must be at least 12 characters long, contain at least one number, at least one lowercase letter and one uppercase letter, at least one special character, and must not contain the stored email address or user name.**

- You will then be taken to the 2-factor authentication setup page. You can scan the QR code displayed there with your mobile phone using the authenticator app of your choice (Microsoft Authenticator, Google Authenticator, 1Password and others). A 6-digit number will usually be displayed on your mobile phone, which you must enter here.



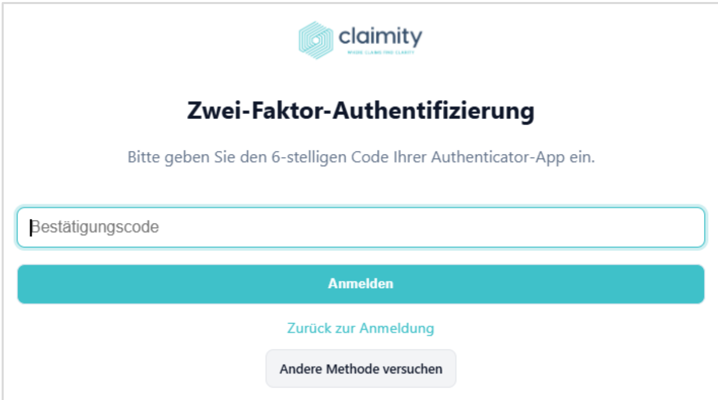
- You have now set up two-factor authentication (2FA). You will now be asked to save the backup codes and store them in a safe place. These are necessary to log in again if MFA is not available. Then select the confirmation checkbox at the bottom and click on the "I have secured my codes" button.

- Now everything is complete – you have registered, set your password, set up your 2FA and saved your backup codes, and you are logged in to Claimity.

1.2 Logging in to the platform

- If you want to log in again at a later date after registering, enter your login details at app.claimity.ch.

- You will now be prompted for two-factor authentication. To do this, use the authenticator app on your smartphone. Enter the numbers displayed for Claimity and confirm by clicking on "Log in".



- You are now logged in to the platform.

1.3 Update profile information

After logging in for the first time, you can enter your details directly under your profile (click on your name in the navigation bar at the bottom left).

Please be sure to enter your telephone number and language preference.

1.4 Reset password

- If you would like to reset your password, click on "Reset password" at the bottom of the login form and enter your email address. You will receive an email with a button labelled "Create new password".

- First, you will need to use your authenticator app again. If this is not available (e.g. due to a new smartphone or PC), use one of the backup codes stored under "Use another login method."
- In the next step, you can set your new password. Please ensure that it meets the **following** requirements: **The password must be at least 12 characters long, contain a number, one lowercase letter and one uppercase letter, one special character, and must not contain the stored email address or username.**
  Furthermore, it must not correspond to a previously set password.
- You will then be logged in to the platform.

2 Processing and submitting cases

2.1 Accepting and rejecting a request

- In the navigation bar, click on **"Assignment"**→ Viewing assigned cases
- Click on **Accept**→ The case will appear under **"My Cases".**
  If it is not possible to accept the case, go to the "Reject" tab→ Enter the reason for rejection→ Reject permanently.

2.2 Edit and submit cases

- Under **"My cases"** you can view all cases assigned to you. You can filter the cases by status (e.g. in progress) using the menu.
- Via **"Show details",** you can view all the information about the case provided by the insurance company in the **overview**. You can also view the information in PDF format via **"Export PDF"**.
- Here you can also assign the person responsible for this case in your organisation. To do this, click on "Responsible" in the top right-hand corner and select an employee. This way, the insurance company also knows who to contact for this case. This is also useful for you internally, as it allows each employee to filter only their own cases and have a better overview.
- Under **"Documents",** you can view and download the damage report.
- Under **"Report"**, upload the documents that the insurance company needs to process the case. You can upload as many documents as you wish here. Each document may be a maximum of 50 MB in size.
- Click on **"Submit report"** to submit the report to the insurance company. If you have already submitted a report but would like to send an addendum, you can select "Start new report".
- Under **"Invoice"**, you can upload the invoice addressed to Claimity for this case.
- Under History, you can see what has happened at what time during the case processing.

2.3 Chat functions for queries

- →For **administrative, platform-related queries**, select **"Show details"** under **"My cases"→ "Messages"** in the top left-hand corner **"With Claimity"**. You can then write directly to a Claimity employee and see their reply there. This is useful if you have platform-related problems or a question about invoicing. The chat will be highlighted later if you have received a reply, so you won't miss the answers. If you have questions about the content of the case, please contact the insurance company.
- →If you have **questions about the content of a case**, select **"Show details"** under **"My cases"→ "Messages"** in the top left corner **"with insurer"**. You can then write directly to an insurance company employee and see their reply there as well. You can also upload attachments (e.g. the report or pictures of the damage) to your message to refer to something directly. The chat will be high-lighted later if you have received a reply, so you won't miss the answers.

3 Portal operation

3.1 Working in the portal (overview, cases, reports, messages)

3.1.1 Dashboard

- **Key figures at a glance:** number of **assigned cases**, **open cases** and **closed cases**.
- **Inspection type and status:** On the left, you will see a diagram that visualises how many cases have a particular status (e.g. closed, in progress, etc.). On the right, you will see the number of cases by inspection type, so you can see at a glance what types of cases are most frequently submitted to you via Claimity.
- **Open cases:** Here you can see the currently open cases per employee in order to assess and manage your employees' workload. You will also see a bar chart on the right-hand side that visualises how many cases have been open for a long time. This serves as a reminder to close these cases promptly.

3.1.2 My cases

- **Status tabs:** All cases, In progress, Under review, Closed.
- **Search:** By case ID, claim number, category or summary.
- **"My cases only":** Toggle switch for personal view; deactivated = all cases in the organisation. (To do this, assign a person from your organisation to the case under All cases→ Show details→ Responsible).
- **List details:** Show claim date, creator, assignment (e.g. Not assigned / Claimity expert), status and details.
- **Archived cases:** When you click on "Show details" for a case, you have the option to archive the case in the top right-hand corner. This means that it will no longer be displayed in the general view. All data relating to the case remains stored and can be viewed at any time via the "Archived" tab. The case can also be unarchived at any time.
  This function is recommended for older cases in order to maintain an overview.

Admin setting: The expert admin can specify whether notifications, chats, etc. are only displayed for assigned employees or are visible to all employees in the organisation.

3.1.3 Reports (approved reports/reviews)

- **Filter by status:** All cases, Draft, Submitted, For revision, Approved tabs.
- **Search:** By case ID, category, report comment or file name.
- **View & download:** Report files (preview/download); Details opens the corresponding case.

3.1.4 Messages / System Notifications

- **Inbox:** All, Unread, Read tabs.
- **System messages** provide information about profile notes, approvals or changes, for example.
- **Actions:** Open, forward, delete if necessary (according to role permissions).
- **New messages are highlighted**

3.2 Tip box

- Activate "Only my cases" to focus the list.
- Use the status tab in the case list to find processing steps more quickly.
- In the Reports section, you will find all the approved documents in your organisation — ideal for revision/export.
- Archive cases that are already long past to keep track of things (to do this, go to All Cases→ Show Details→ Archived: Press switch. Archived can be found at the top right).

  Archived cases are still stored permanently and can be viewed using the filter for archived cases. However, they are no longer displayed in the general list.

4 Settings (for administrators)

- In the navigation bar on the left, you will see a menu item called "Settings".
  As an administrator, you will then see the following 5 menu items:
  - **Users and roles:** Here you can add employees from your organisation and assign them a role (member or admin). The invited employee will then receive an email allowing them to register on the platform under your organisation.
    You can also remove users.
  - **Messages:** Here you can configure settings to determine whether an email should be sent to the employee's email address or the organisation's email address. You can send an email for four different scenarios: a new case has been submitted to you, a submitted report has been approved, a submitted report has been rejected, and you have received a new chat message.
    Case assignments are always sent to the organisation's email address, as no responsible person has been assigned at this point.
    For all other cases, as an administrator, you can decide whether the emails should be sent to the organisation's email address or to the email address of the responsible person. You can also select the language of the email for organisation emails. If the responsible person receives the email, it will always be sent in the language that the responsible person has specified in their Claimity profile.
  - **Organisation:** Please enter your organisation's information here.
  - **API access:** Here you can request access to the Claimity API to simplify data transfer between your internal system and Claimity, thus saving time when processing cases. All information on setting up the API, data security and further information can be found in the API documentation: https://docs.claimity.ch/de/api/.
    If you are unsure about anything, please do not hesitate to contact Claimity and ask for support or advice:info@claimity.ch .
  - **Rates:** Under Rates, you can see your rates for the various services. If you have any questions about this, please contact Claimity:info@claimity.ch .

- Non-admins can also view the information, with the exception of the rates, but can-not make any changes whatsoever.

info@claimity.ch