Claimity: Instructions for insurance end users of the platform

Vehicle expertise, experts, fraud investigation

This guide shows the end-to-end process in the Claimity portal from the insurance company's perspective. The five steps are always structured in the same way:

1) Basic data

2) Location & date

3) Damage details

4) Documents

5) Review & submission

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

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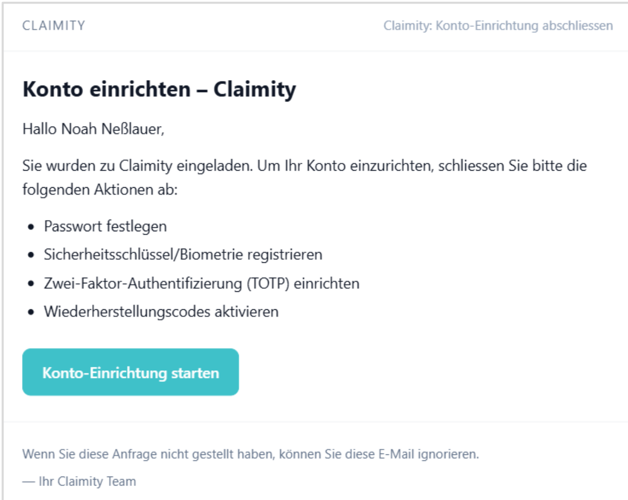
info@claimity.ch

1 Registration and login on app.claimity.ch

1.1 Initial 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 should 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.**

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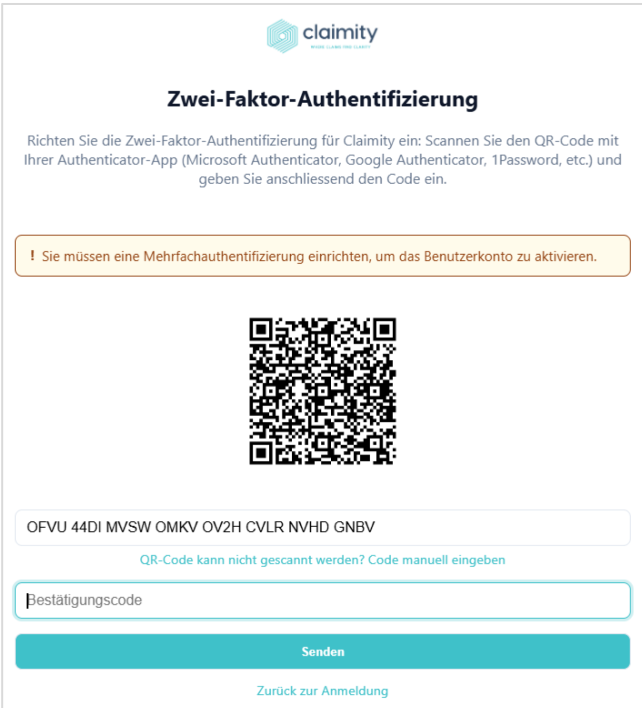
- You will then be taken to the 2-factor authentication setup. You can scan the QR code displayed using your mobile phone and the authenticator app of your choice (Microsoft Authenticator, Google Authenticator, 1Password and others). A 6-digit number will usually be displayed on your mobile phone, which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



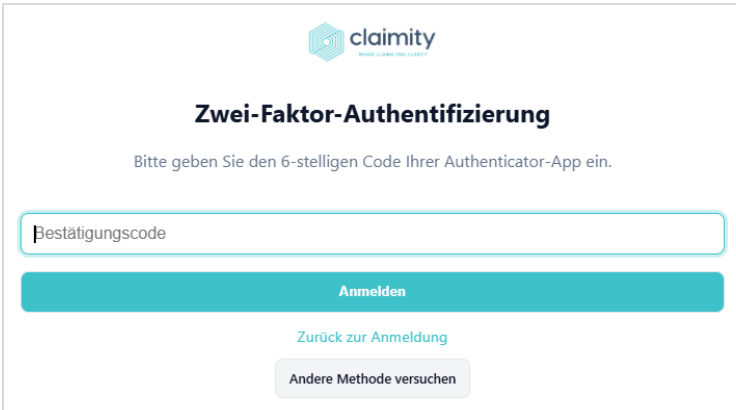
- You have now set up both authentication options. You will now be asked to save the backup codes and store them in a safe place. These are necessary to log back in to if MFA is not available. Then select the confirmation check mark at the bottom and click on the "I have secured my codes" button.

- Now everything is complete – you have registered, set your password, set up your two-factor authentication (2FA), saved your backup codes and logged in directly 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. You can enter the numbers displayed in the authenticator app 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 be the same as a previously set password.
- You are now logged in to the platform.

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2 Case creation

2.1 Select Start & Case Category

- "Create new case" → "Enter manually".
- Select category:
  - Vehicle assessor (motor vehicle damage claims)
  - Expert (buildings/household contents/infrastructure)
  - Combating insurance fraud

Note: In addition to "Manual", OCR (PDF upload with automatic reading) and API connection to the insurer's inventory system are also available. However, the API must be set up by your organisation and adapted to the inventory system in order to be functional. If you are interested in this, please contact Claimity at info@claimity.ch. Once set up, you will receive individual introduction and training.

2.2 Common procedure (for all categories)

Some of the following entries are mandatory fields, while others are optional. Mandatory fields are marked with an asterisk (*) in the platform itself and in the API documentation at https://docs.claimity.ch/de/api/.

- Basic data
  - Claim number
  - Sector (see differences per category below)
  - Claim type
  - Details of the policyholder and, if applicable, their vehicle
  - Details of the other party (in liability cases) and, if applicable, their vehicle
- Place & date
  - Address, postcode, town
  - Date of damage
- Details of the damage
  - Description of damage
  - Estimated amount of damage (CHF)
  - Type of inspection (see below for details)
    - Vehicle assessment: workshop, private inspection, live assessment, check cost estimate, check invoice

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- Expert: On-site inspection, check cost estimate, check invoice
- BVM: No type of inspection

  - Inspection date:
    - "Immediately" = next day if possible or
    - select specific date
- Documents
  - Upload photos/documents/videos (e.g. photos of damage, contract/invoice, ID cards).
  - Multiple files are possible; meaningful file names help with the review.
- Review & submit
  - Check the summary.
  - Submit case – data cannot be edited after this point.
  - Successful transmission will be confirmed; the case will be sent directly to the relevant experts.

2.3 Differences by category

2.3.1 Vehicle assessor (motor vehicle)

- Sector: Liability / Partial comprehensive insurance / Comprehensive insurance
- Type of damage: Free text (e.g. "parking damage", "glass breakage")
- Type of inspection (selection):
  - Workshop
    - Additional fields: Workshop name, telephone number, address, post-code, town
    - Inspection date: "Immediately" or specific date
  - Private inspection
    - The "Private viewing" section is pre-filled with the VN data; if you wish to specify a different person/address, select "Enter other ad-dress".
    - Viewing date as above
  - Live expertise
    - The "Contact for live expertise" field is pre-filled with the VN data. If the desired person/address differs, select "Enter other address".
    - Viewing date as above
  - Check cost estimate

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- No appointment necessary; upload relevant health insurance documents in the "Documents" step.
- Check invoice
  - No appointment necessary; upload invoice documents.

Notes

- For liability insurance, the other party's details are recorded or automatically transferred for further processing.
- Location is supported from the postcode entry (selection list).

2.3.2 Expert (building / household contents / infrastructure)

- Sector: Building / household contents / infrastructure
- Type of damage: Selection (e.g. fire, natural hazards, snow slide, theft, animal collision, martens damage, glass breakage, vandalism, assistance, falling objects, parking damage)
- Type of inspection:
  - On-site inspection (appointment as above)
  - Check cost estimate (upload documents, no appointment)
  - Check invoice (upload documents, no appointment)

Notes

- In the case of liability insurance, the other party's details are automatically transferred for further processing.
- In the case of own damage, the policyholder's details are used accordingly.

2.3.3 Combating insurance fraud (simplified process)

- Basic data: claim number, policyholder details (name, address, postcode/town, telephone number); optional counterparty
- Place and date of claim: address/postcode/town, date

- Claim details: description of the claim and desired assistance (briefly specify), estimated amount
- Upload documents
- Review & submit

2.4 Quality check before submission (recommended)

- Is the claim number and category correct?
- The damage description explains, as far as possible, the circumstances of the damage and all other information relevant to the assessment of the case.
- Type of inspection selected appropriately (workshop/private vs. inspection of KV/RE without appointment).
- Documents:
    - At least overview photos (close-up + overall view)
    - For inspection: KV/invoice in full
    - Optional: Policy, registration/VIN, workshop/contact person

2.5 Frequently asked questions & tips

- "Immediately" means the next working day for scheduling.
- Date format: dd.mm.yyyy.
- No changes can be made after submission; please report any corrections to Claimity. A chat function with Claimity is available for this purpose.
- Data economy: Only upload documents that are necessary for the assessment.

2.6 Assignment of cases within the organisation

- To maintain clarity and inform the expert of the contact person, you should ensure that the case is assigned to the correct employee within the organisation. By default, cases are assigned to the employee who created the case.
- However, if you create and submit a case that a colleague is then supposed to handle, go to All cases→ Show details at the top right, click on "Responsible" and select the responsible employee.

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- If you activate the "Only my cases" button (top right) under "All cases", you will see all cases in which you are listed as the responsible person.

2.7 Short checklist

- Category selected (motor vehicle / social security / fraud)
- Basic data complete (including division & type of damage)
- Location and date correct
- Damage details + total recorded
- Type of inspection correct (workshop/private or KV/RE inspection)
- Documents complete (photos, KV/RE)
- Summary checked → Submit case

3 Portal operation

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

3.1.1 Dashboard

- Key figures at a glance: tiles for new, in progress, review, completed.
- **Quick actions:**
  - **Search for cases** (direct link to case list)
  - **Create new case** (direct link to "New case")
  - **Export reports** (direct link to approved reports/invoices)
- **Category and status:** On the left, you can see the number of cases by category (vehicle, expert, insurance fraud).
  On the right, you can see how many cases have a particular status (closed, in progress, etc.).
- **History:** The history provides you with an overview of the number of cases you have referred via Claimity. You can view the history on a daily, monthly and yearly basis.

3.1.2 All claims

- **Status tabs:** All cases, New, In progress, Rejected, Under review, Closed.
- **Search:** by **case ID**, **claim number** or **type**.
- **"My cases only"**: Toggle switch for personal view; deactivated = all cases in the organisation.
- **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.

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- **Admin setting:** The insurance administrator can specify whether notifications, chats, etc. are only delivered for assigned cases or are visible for all cases in the organisation.

3.1.3 Reports (approved expert opinions/inspections)

- **Filter by category:** All cases, vehicle, expert, insurance fraud tabs.
- **Search:** by case ID, category, report comment or file name.
- **View & download:** Expert report comments and 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).

3.1.5 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 shared documents** in your organisation — ideal for revision/export.

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4 Case details and chat functions

4.1 Case details after submission (Details view)

After submission (step 5), you can view all information in the case view via "All cases" > "Details".

- **Overview – all submitted content**
- **Documents – uploads & receipts**
- **Messages – Direct messages**
  - **Case-related chat** with timestamp.
  - Toggle switch **"With experts"** / **"With Claimity"** for separate conversation histories.
  - You can attach **files** directly to the message (e.g. submit a missing invoice).
- **Report – Expert opinions/reviews**
  - **Report overview** with title/number (e.g. *Report #1*), **status badge** (e.g. *Approved/Under review*), expert **comment**.
  - **Report files** with *display* and *download*.
- **History – complete history**
  - **Chronological timeline** of all system and processing steps with date/time, e.g.: *Case created* → *Assigned* → *Accepted* → *In progress* → *Report under review* → *Approved by admin* → *Closed*.
  - Serves as **an audit trail** for traceability and revision.

5 Settings (for admins)

- In the navigation bar on the left, you will see a menu item called "Settings".
  As an admin, 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 in two different cases: an approved report has been submitted to your organisation or a new chat message has been sent to your organisation.
    As an administrator, you can decide for both cases whether the emails should be sent to the organisation's email address or to the email address of the person responsible. You can also select the language of the email for the organisation's emails. If the person responsible receives the email, it will always be sent in the language that the person responsible 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, thereby 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 cannot make any changes whatsoever.

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