MSIG
EASYi Claims and Policy Management Portal (EASYi)

User Guide

PROTECTING GOALS POWERING FUTURES

MSIG

A Member of **MS&AD** INSURANCE GROUP

// EASYi
Claims and Policy
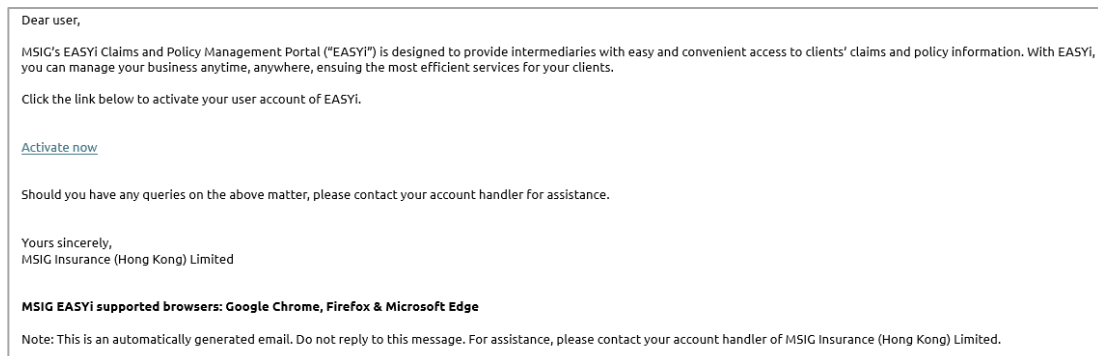# Management
Portal address //

To access:
https://easyi.msig.com.hk

Supported browsers: Chrome, Firefox & Microsoft Edge
Supported platforms: Desktop & Mobile

Activation process

Dear user,

MSIG's EASYi Claims and Policy Management Portal ("EASYi") is designed to provide intermediaries with easy and convenient access to clients' claims and policy information. With EASYi, you can manage your business anytime, anywhere, ensuing the most efficient services for your clients.

Click the link below to activate your user account of EASYi.

Activate now

Should you have any queries on the above matter, please contact your account handler for assistance.

Yours sincerely,
MSIG Insurance (Hong Kong) Limited

MSIG EASYi supported browsers: Google Chrome, Firefox & Microsoft Edge

Note: This is an automatically generated email. Do not reply to this message. For assistance, please contact your account handler of MSIG Insurance (Hong Kong) Limited.
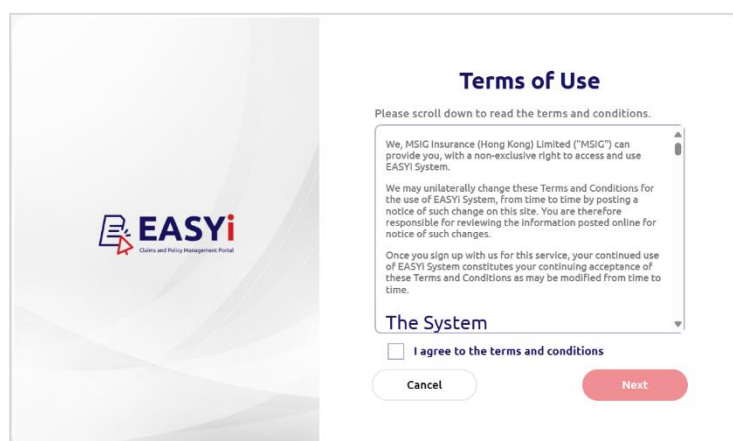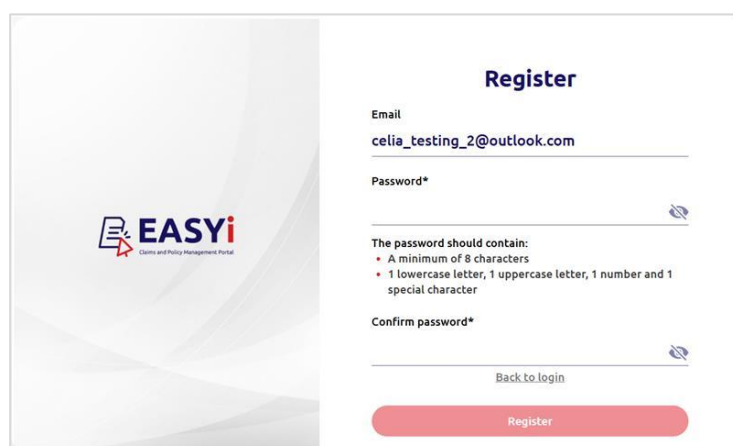
▶ Partner owner, admin and standard user will receive an email invitation for account activation.

▶ Click "Activate now" to activate your account for EASYi Claims and Policy Management Portal.

▶ Before entering the EASYi Claims and Policy Management Portal, please accept "Terms of use".

Terms of Use

Please scroll down to read the terms and conditions.

We, MSIG Insurance (Hong Kong) Limited ("MSIG") can provide you, with a non-exclusive right to access and use EASYi System.

We may unilaterally change these Terms and Conditions for the use of EASYi System, from time to time by posting a notice of such change on this site. You are therefore responsible for reviewing the information posted online for notice of such changes.

Once you sign up with us for this service, your continued use of EASYi System constitutes your continuing acceptance of these Terms and Conditions as may be modified from time to time.

The System

☐ I agree to the terms and conditions

Cancel   Next

▶ Once "Terms of use" is accepted, please create a new password and confirm the new password.

Register

Email
celia_testing_2@outlook.com

Password*

The password should contain:
• A minimum of 8 characters
• 1 lowercase letter, 1 uppercase letter, 1 number and 1 special character

Confirm password*
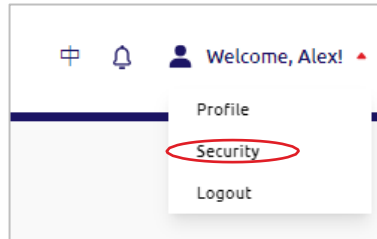
Back to login

Register

▶ New password must have:

- A minimum of 8 characters
- 1 lowercase letter
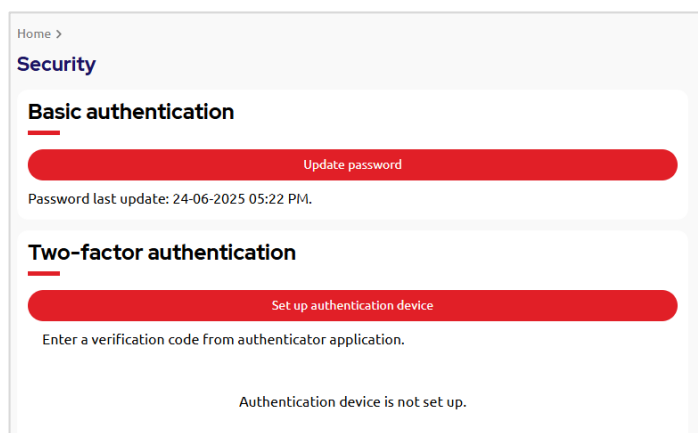- 1 uppercase letter
- 1 number
- 1 special character

Enable two-factor authentication

▶ EASYi Claims and Policy Management Portal is equipped with security protocols for data protection. Please select "Security" under welcome.
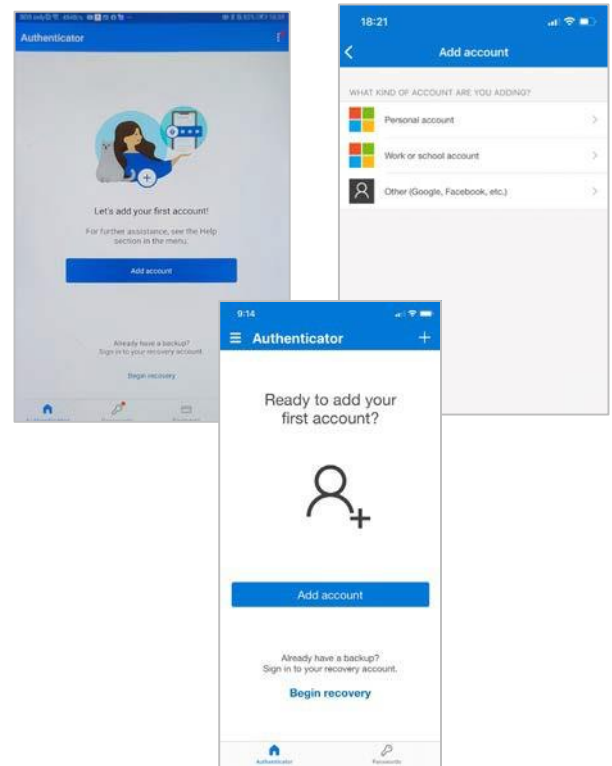
▶ Click "Set up authentication device" under Two-factor authentication.

▶ For example, we use Microsoft Authenticator App to setup two-factor authentication. Any other authenticators app, such as Google Authenticator can be used in a similar way.

Please download "Microsoft Authenticator App" to your mobile device.

Once downloaded, please click "Add new account".

Enable Two-factor authentication

▶ Scan the QR code shown on EASYi Claims and Policy Management Portal.

EASYi

Mobile authenticator

1. Install one of the following applications on your mobile:
   - FreeOTP
   - Google Authenticator
   - Microsoft Authenticator

2. Open the application and scan the QR code:

Unable to scan?

3. Enter the one-time code shown on the application and click "..."
   You may also provide a device name to help you manage your...

One-Time code*

Device Name*

☑ Sign out from other devices

Submit

▶ Once the QR code is scanned, an account will be created.

Locate the one-time code, for this example, "406 483".

☰ **Authenticator**   🔍 +

msighk

406 483 ⑰
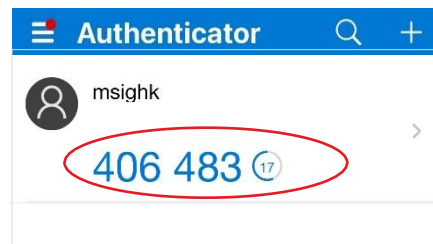
▶ Enter the code and device name. The device name can be entered freely for identification purposes. Then click "Submit".

If the "code" has expired, an error message will be shown. Please obtain a new code from the authenticator app again.

3. Enter the one-time code shown on the application and click "Submit" to complete the setup.
   You may also provide a device name to help you manage your OTP devices.

One-Time code*
406483

Device Name*
iPhone

☑ Sign out from other devices

Submit

▶ From now on, after entering your email and password during login, you will need to generate a one-time code from the authentication app.
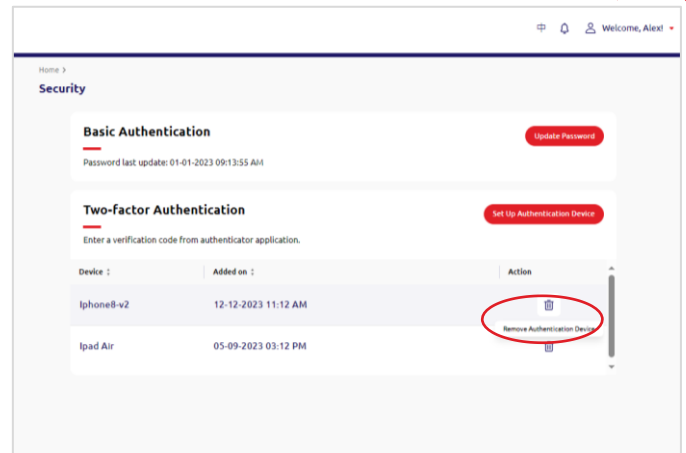

Sign in EASYi

Please enter the code from your mobile authenticator app.
Code

Sign in

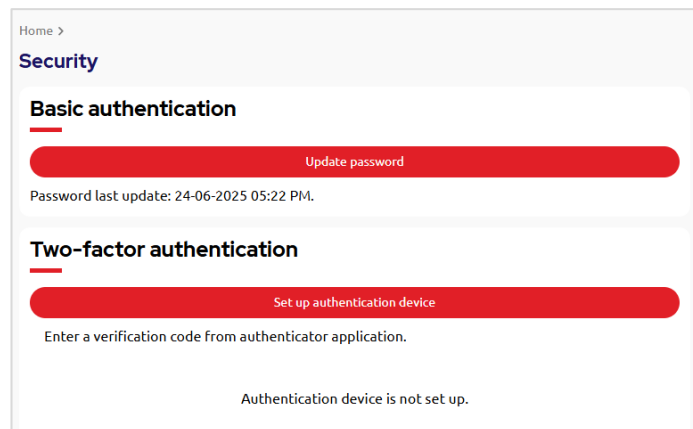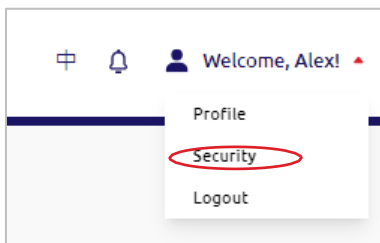# Disable Two-factor authentication

▶ To disable authentication, please select "Security" under welcome message, then click "Remove authentication device".

Update password

▶ Select "Security" under welcome. Then press "Update password" under Basic authentication.
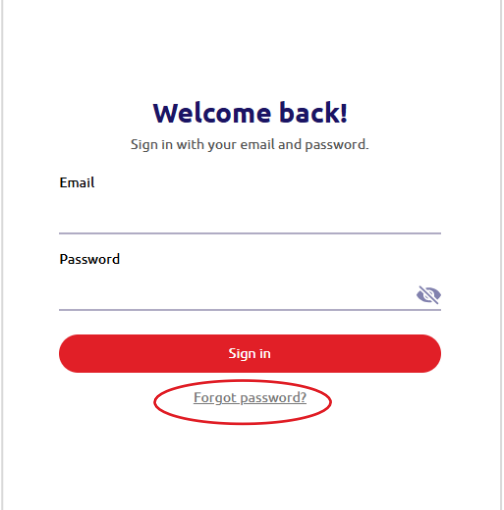

New password must have:

- A minimum of 8 characters
- 1 lowercase letter
- 1 uppercase letter
- 1 number
- 1 special character

Reset password

▶ The default number of password retry attempts is set to three, allowing users a maximum of three attempts at logging into their account before they are locked out. When lock out occurs, an error message will be shown.

Users may "unlock" their accounts by clicking "Forgot password" and follow the instructions provided.

▶ Password will always be expired in 60 days. You will be redirected to reset password page upon successful authentication.

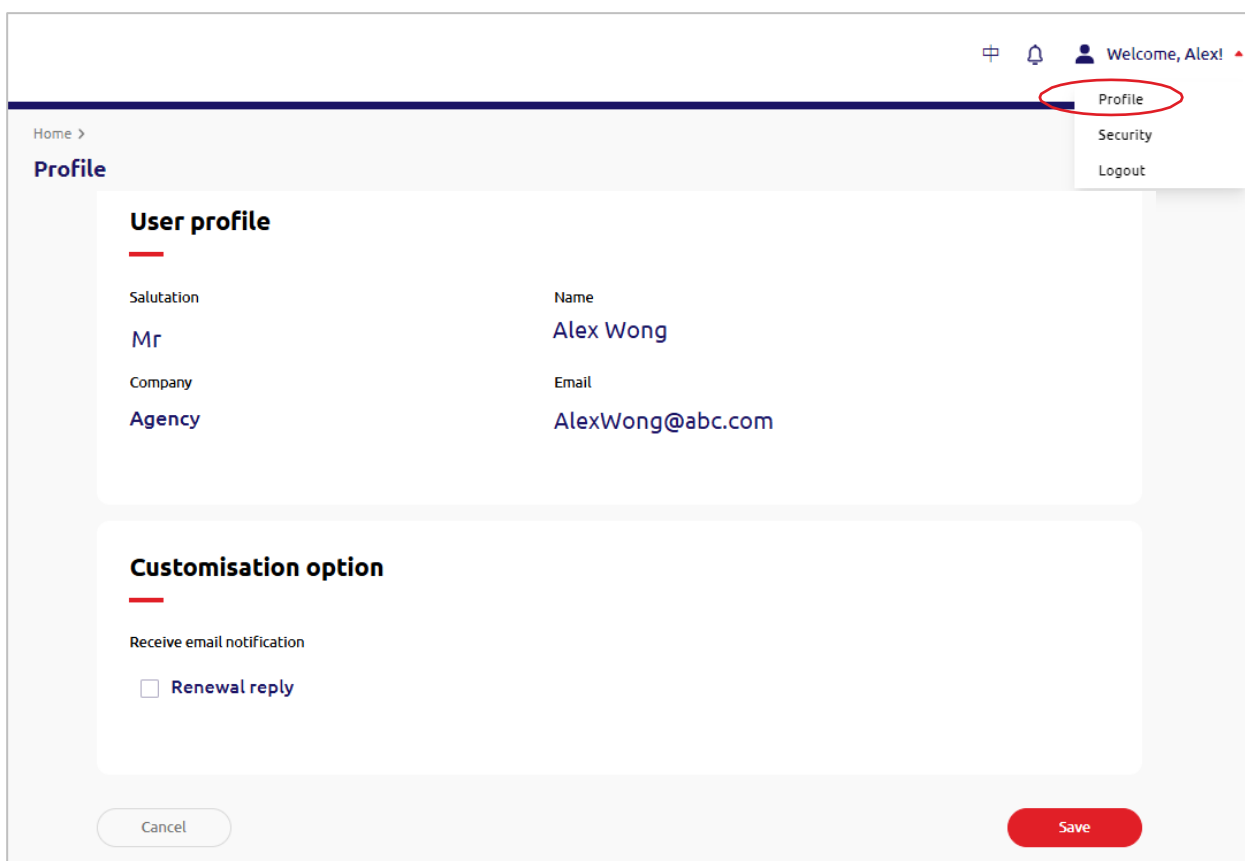**Welcome back!**

Sign in with your email and password.

Email

Password

Sign in

Forgot password?

User profile

▶ At the top right corner, please select "Profile" under welcome message to view user profile.

Home

After login, you can see a navigation menu at the left-hand side. You can switch between different sections by clicking the respective section.

At Home, you can see the notification bar at the top showing important messages such as system maintenance arrangement, including maintenance schedule and any potential impact on system availability.

Next, you can see the News section with the latest promotion offers available. Just swipe to the left to see more.

Home
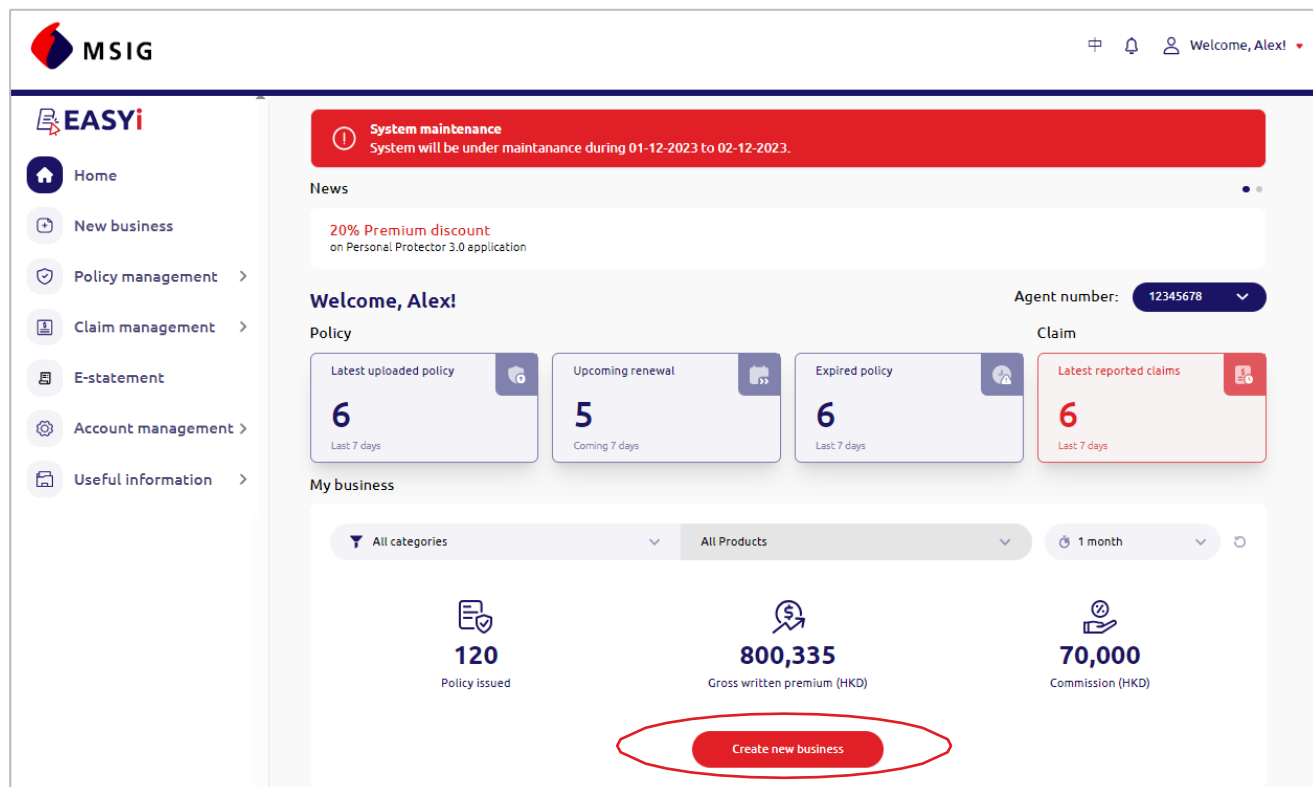
The homepage provides you with an overview of your business. You can select the agent number to easily access business related information, including the latest uploaded policy, upcoming renewals, expired policies, and the most recent claims.

You can also click on these modules to directly visit the relevant pages.
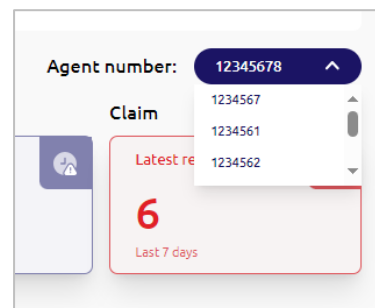
You can track the number of policies issued, gross written premium and commission for each product within a specified period, giving you a clear view of your business performance.

The "Create New Business" button enable you to directly obtain quotes and issue policies.
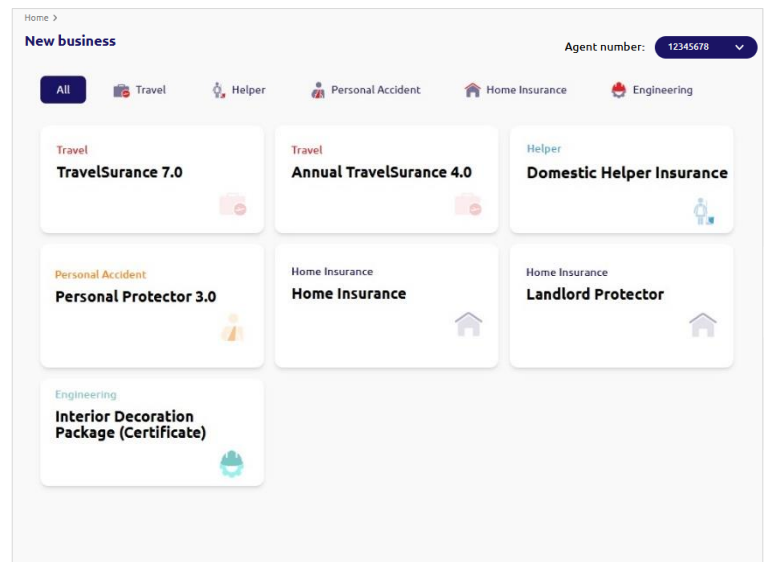
New business

Create new business

▶ To create new business, press "New business" in the navigation menu.
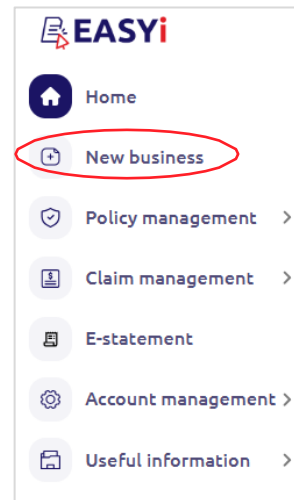
▶ Select the product under "New business".

1 For example, you are going to issue an annual travel insurance policy, select "Annual TravelSurance 4.0"

2 Input details to get fast quotation.

Create new business

3 Fill in the proposer information.

To protect your privacy, the commission is hidden by default. If you wish to view it, simply click the "Show" button to unhide the information.

Annual TravelSurance 4.0

Agent number: 12000035

✓ Fast quotation ----- **02** Proposer information ----- **03** Insured information ----- **04** Confirmation & submit

Quotation
Premium
HKD 4,950.00
+
IA levy
HKD 4.95
=
Total
HKD 4,954.95

Commission
HKD **** 👁 Show

Please complete in English
*Required

Proposer details

Surname*
Chan

Given name* ⓘ
Tai Man

Gender
○ Male ○ Female

Date of birth*
DD-MM-YYYY 📅

ID type*
⦿ HKID ○ Passport

ID number*
A1234567

Marital status
○ Single ○ Married

Mobile number
852 ▾ 12345678

Email
example@mail.com

Country of residence
Hong Kong

---

4 Fill in the insured information.

Please complete in English
*Required

Insured person details

⇕ Show less

Destination
Worldwide

⌃ **Insured 1**

Surname*
Chan

Given name*
Tai Man

Date of birth*
02-05-2007

ID type*
HKID

ID number*
W8227791

Individual plan type*
Class C

⌃ **Insured 2**

🗑 Clear

Surname*
Chan

Given name*
Tai Man

Date of birth*
DD-MM-YYYY 📅

ID type*
HKID ▾

ID number*
A1234567

Individual plan type*
Class C

External reference no. ⓘ

Back   Continue

Create new business

5 Review the information and premium amount, then click "Submit".

Annual TravelSurance 4.0

Agent number: 12000035

✓ Fast quotation --------- ✓ Proposer information --------- ✓ Insured information --------- **04** Confirmation & submit

Quotation

Premium		IA levy		Total
HKD 4,950.00	**+**	HKD 4.95	**=**	HKD 4,954.95

Commission

HKD ****   👁 Show

Information review

Aggregate limit of the policy is HKD 15,000,000 for any one accident.

Travel details

Destination	Date	Plan
Worldwide	06-05-2025 to 05-05-2026	Individual plan - Gold plan

Correspondence address
FLAT A, 10/F
BLOCK 2, TAI MAN BUILDING
WAN CHAI DISTRICT, HONG KONG.

Proposer details

Surname	Given name	Gender	Date of birth	ID type	ID number
Chan	Tai Man	Male	02-05-2007	HKID	W8227791

Mobile number	Email	Country of residence
+852 91234567	chantaiman@gmail.com	Hong Kong

Insured details

Insured 1

Surname	Given name	Date of birth	ID type	ID number	Plan type	Class
Chan	Tai Man	02-05-2007	HKID	W8227791	Individual plan - Gold plan	Class C

Insured 2

Surname	Given name	Date of birth	ID type	ID number	Plan type	Class
Cheung	Siu Man	06-05-2009	HKID	R8568234	Individual plan - Gold plan	Class C

Clause

G111 Sanction Limitation and Exclusion Clause
A133 Terrorism Extension (Applicable to Section 1 and Section 2 only)

Declarations

1. All insured person(s) has/have not made any travel claims in past 3 years.
2. All insured person(s) has/have not ever been refused by Insurer to offer travel insurance or added special terms.
3. All insured person(s) has/have not ever been convicted of any offence involving dishonesty fraud, violence, criminal damage, arson, drugs or any prosecution pending.
4. All insured person(s) is/are in good health and free from physical defects, infirmity or illness or recurring illness.
5. All insured person(s) is/are not travelling against the advise of any medical practitioner or for the purpose of obtaining medical treatment.
6. All insured person(s) is/are unaware of circumstance which is likely to lead to the cancellation or curtailment of the journey.
7. All insured person(s) has/have authorised the proposer to complete the application on his/her behalf and declared all information given the application are true and correct to the best of his/her knowledge; and believe all material facts have been disclosed and have not withheld information which is likely to influence the acceptance of the application of this Policy.
8. All insured person(s) agree that all provided information in the application and declarations should be the basis of the contract.
9. All insured person(s) agree to all of the declarations, terms and conditions and Personal Information Collection Statement.
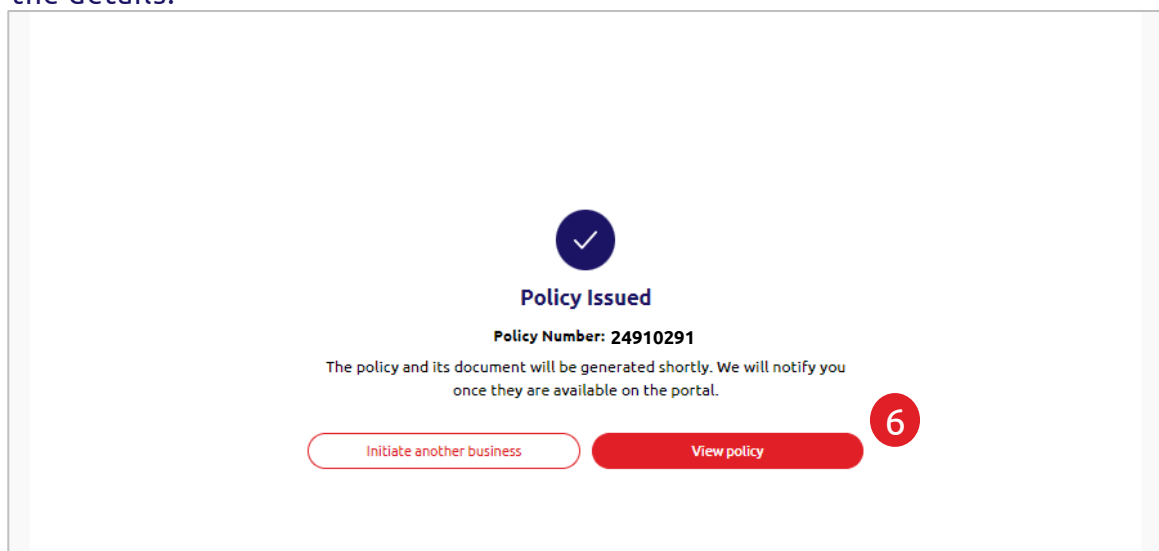
☐ Proposer does not wish to receive any discount offers and direct marketing materials or message from MSIG Insurance (Hong Kong) Limited in the future.
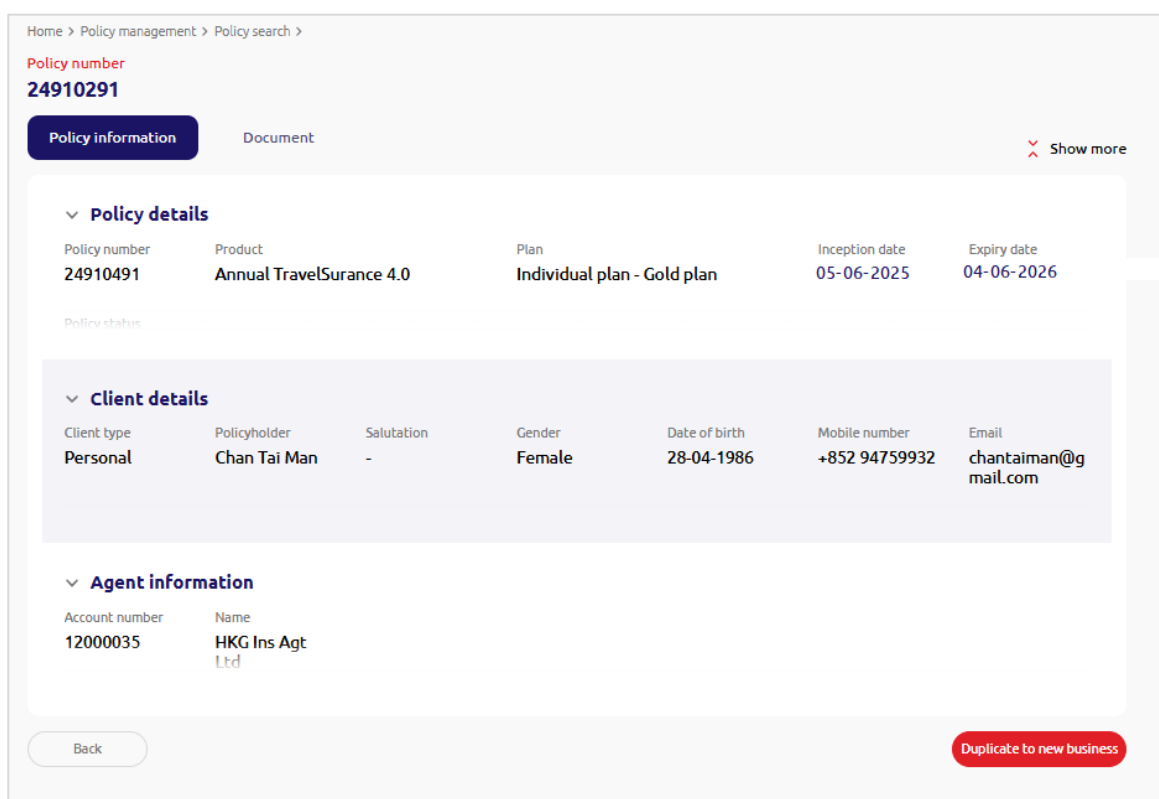
External reference no. ⓘ

[Back]   [**Submit**]

Create new business

6 An Annual TravelSurance 4.0 policy is issued. You can click "View policy" to view the details.

Policy Issued

Policy Number: **24910291**

The policy and its document will be generated shortly. We will notify you once they are available on the portal.

[Initiate another business]   [**View policy**]   **6**

7 You can view the policy details, client details and agency information.

Home > Policy management > Policy search >

Policy number
24910291

[**Policy information**]   Document   ⌄ Show more

⌄ **Policy details**

Policy number	Product	Plan	Inception date	Expiry date
24910491	Annual TravelSurance 4.0	Individual plan - Gold plan	05-06-2025	04-06-2026

Policy status

⌄ **Client details**

Client type	Policyholder	Salutation	Gender	Date of birth	Mobile number	Email
Personal	Chan Tai Man	-	Female	28-04-1986	+852 94759932	chantaiman@gmail.com

⌄ **Agent information**

Account number	Name
12000035	HKG Ins Agt Ltd

[Back]   [Duplicate to new business]

Create new business

8 You can retrieve the policy documents by selecting the "Document" tab. Click "Download" or "Email me", allowing you to send the policy documents to your clients right away.

Home > Policy management > Policy search >

Policy number
24910291

Policy information | **Document**

All files [21]

⬇ Download   ✉ Email me

	Effective date ⇅	Document name ⇅	Document type ⇅
☐	05-06-2025	249104912-20240102RN-Agent-DC-Note.pdf	Schedule
☐	05-06-2025	249104912-20240101-RN-RenewalNotice.pdf	Renewal Notice
☐	05-06-2025	249104912-20240102RN-Client-DC-Note.pdf	Agent Debit / Credit Note
☐	05-06-2025	249104912-20240102RN-Schedule-Full.pdf	Agent Debit / Credit Note
☐	05-06-2025	249104912-FAMCG09-Jacket.pdf	Policy Wording
☐	05-06-2025	249104912-20230101-RN-RenewalNotice.pdf	Agent Debit / Credit Note

Policy management

Policy renewal

▶ You can renew a policy or check the renewal status of the policies by selecting "Policy renewal" under "Policy management".

Home > Policy Management >

Policy Renewal

Records of the last and coming 3 months will be shown if you directly click "Search".

Policy Number	Policyholder	Agent Number
		⌄

Status	Expiry Date (From)	Expiry Date (To)
⌄	17-05-2024	17-05-2024

Clear   Search

▶ To search for a specific policy, please enter the policy number and policyholder name, and select the agent number, status and specific time period. If no search criteria are entered, records of the last 3 months and coming 3 months will be displayed when clicking "Search".

▶ Policies with status of pending, replied, renewed, hold cover, or lapsed will be shown.

▶ Select the required policies, then click the download/export buttons above the table to download the renewal notice or export the search result.

Search Result 19   1 selected ⬇ Download Renewal Notice ⬈ Export Search Result

		Policy Number ⇕	Policyholder ⇕	Expiry Date	Renewal Decision	Status	Action
⌄	☑	17332133	Chan Tai Man	01-05-2022	Renew	Pending	💬
⌄	☐	18346332	Chan Tai Man	01-05-2022	Renew	Replied	📄
⌄	☐	23559232	Chan Tai Man	01-12-2022	Renew	Renewed	📄
⌄	☐	19283473	Chan Tai Man	12-04-2023	Renew	Replied	📄
⌄	☐	15023958	Chan Tai Man	21-08-2023	Hold cover at renewal terms	Hold Cover	📄
⌄	☐	14839586	Chan Tai Man	21-08-2023	Hold cover at renewal terms	Lapsed	💬
⌄	☐	14839586	Chan Tai Man	21-08-2023	Hold cover at renewal terms	Lapsed	💬
⌄	☐	14839586	Chan Tai Man	21-08-2023	Hold cover at renewal terms	Lapsed	💬
⌄	☐	14839586	Chan Tai Man	21-08-2023	Hold cover at renewal terms	Lapsed	💬
⌄	☐	14839586	Chan Tai Man	21-08-2023	Hold cover at renewal terms	Lapsed	💬

Item per page: 10   1-10 of 19 ‹ 1 2 ›

You can easily find the required policy documents using either "Policy search" or "Document search". With "Policy search", you can look up all related policy documents under a specific policy. Meanwhile, "Document search" allows you to search for specific types of policy document across all policies.

Policy search

▶ Select "Policy search" under "Policy management" and enter policy number, policyholder or date for the search.

Home > Policy Management >
Policy Search

🔍 Policy number, policy holder or date is required for the search.

Policy Number

Policyholder

Agent Number

Product Keyword
E.g. Travel

Date Type
◉ Inception Date   ○ Upload Date   ○ Endorsement Effective Date   ○ Expiry Date

DD-MM-YYYY 📅

Policy records since 2020 will be displayed.

Clear   Search

▶ To facilitate intermediaries in issuing the same type of policy for the same client, you can click "Duplicate to new business" after searching for the relevant policy. The relevant details of the policyholder and the insured person will be automatically filled-in. (This function will be available by the end of 2025)

Home > Policy management > Policy search >
Policy number
24910291

Policy information   Document   ⌄ Show more

∨ **Policy details**

Policy number	Product	Plan	Inception date	Expiry date
24910491	Annual TravelSurance 4.0	Individual plan - Gold plan	18-05-2020	18-05-2020

Policy status

∨ **Client details**

Client type	Policyholder	Salutation	Gender	Date of birth	Mobile number	Email
Personal	Chan Tai Man	-	Female	28-04-1986	+852 94759932	chantaiman@gmail.com

∨ **Agent information**

Account number	Name
12000035	HKG Ins Agt Ltd

Back   Duplicate to new business

Document search

▶ Select "Document search" under "Policy management", you can search by selecting a particular document type from the pull-down menu

▶ You can select the required document, then click "Download document" to download it to your device.

Transaction report
(will be available in mid-August 2025)

▶ You can view the transaction report by selecting "Transaction report" under "Policy management".

Select a particular period, then click "Export report".

▶ The transaction report will be downloaded to your device.

Claim management

Claim search

▶ You can check the claimant's claim details by selecting "Claim search" under "Claim management".

Enter any one of the fields including policy number, claim number, claimant name, personal ID number or vehicle number to search and access the claim information.

Home > Claim Management >
Claim Search

🔍 Please enter any one of the fields for the search.

Policy Number	Claim Number	Claimant Name

Personal ID Number	Vehicle Number	
A123456(7)		

Clear   Search

Claim Number
60000775

Claim Information   Document   Correspondence   ⇕ Show Less

⌃ **Policy Details**

Policy Number	Risk Number	Inception Date	Expiry Date
77200110	-	01-11-2017	30-10-2018

Insured Name	Agent Number	Agent Name	
Wong Siu Ming, Samuel	12000035	Alex	

⌃ **Claim Information**

Claim Number	Product Type	Claimant Name
60000775	Property	Wong Siu Ming, Samuel

Loss Date	Report Date	Claim Status
04-01-2018	07-02-2018	Assessment

Claim report

Claim Report

[Claim Summary] Outstanding Claim

Required*

Policy Number	Insured Name	Product Type
_____	_____	_____ ⌄

Agent Number	Agent Name
_____ ⌄	_____

Date*

◉ Loss Date   ○ Report Date

DD-MM-YYYY
_____

Policy records since 2020 will be
displayed.

[Clear]   [Search]

Welcome, Alex!   Agent number: [12345678 ⌄]

Policy   **Claim**

Latest uploaded policy	Upcoming renewal	Expired policy	Latest reported claims
6	**5**	**6**	**6**
Last 7 days	Coming 7 days	Last 7 days	Last 7 days

🔺 You can view the claim summary by selecting "Claim report" under "Claim management" or the "Latest reported claims" shortcut on the dashboard.

Simply select a specific loss date or report date to access the claim summary.

Claim report

▶ Select the tab of "Outstanding claim", you can view the claim status of all outstanding claims.

Home > Claim management >

Claim report

Claim summary   **Outstanding claim**

🕐 Please enter any one of the fields for the search.

Policy number   Insured name   Product type

                                ⌄

Agent number   Agent name

                ⌄

Clear   **Search**

Search result 5   ⤴ Export search result

⇅ ☐	Claim number ⇅	Policy number ⇅	Contract type ⇅	Claimant name ⇅	Claim status ⇅	Action
⌄ ☐	60000433	17332133	EC	Wong Siu Mong, Samuel	Pending (Declined)	▤
⌄ ☐	60000433	17332133	EC	Wong Siu Mong, Samuel	Acknowledgement	▤
⌄ ☐	60000433	17332133	EC	Wong Siu Mong, Samuel	Assessment	▤
⌄ ☐	60000433	17332133	EC	Wong Siu Mong, Samuel	Verification	▤
⌄ ☐	60000433	17332133	EC	Wong Siu Mong, Samuel	Closed (Rejected)	▤

E-statement

(will be available in mid-August 2025)

▶ You can select "E-statement" to view the monthly e-statement, which includes the statement of account and commission statement. This allows you to have a quick overview of your business in a simple way.

Home >
E-statement

All statements   ⬇ Download statement   ➡ Export to Excel
___

E-statements can display up to the latest 24 months of records.
No e-statement will be shown if there is no transaction or balance under the agent number in a specific month.

⬍	☐	A/C month	Agent number	Statement type ⬍	Release date ⬍
⌄	☐	Sep 2024	All	Statement of account	2024-09-30
⌄	☐	Sep 2024	All	Commission statement	2024-09-30
⌄	☐	Aug 2024	All	Statement of account	2024-08-31
⌄	☐	Aug 2024	All	Commission statement	2024-08-31
⌄	☐	Jul 2024	All	Statement of account	2024-07-29
⌄	☐	Jul 2024	All	Commission statement	2024-07-29

1-6 of 6 ‹ 1 ›

Account management

Partner owner/admin

Create user

▶ Select "Add user" under "Account management" to create a new user.
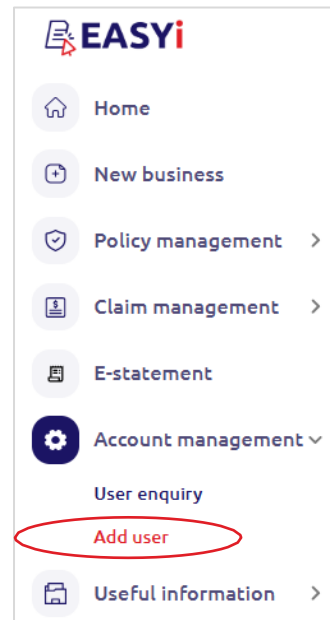
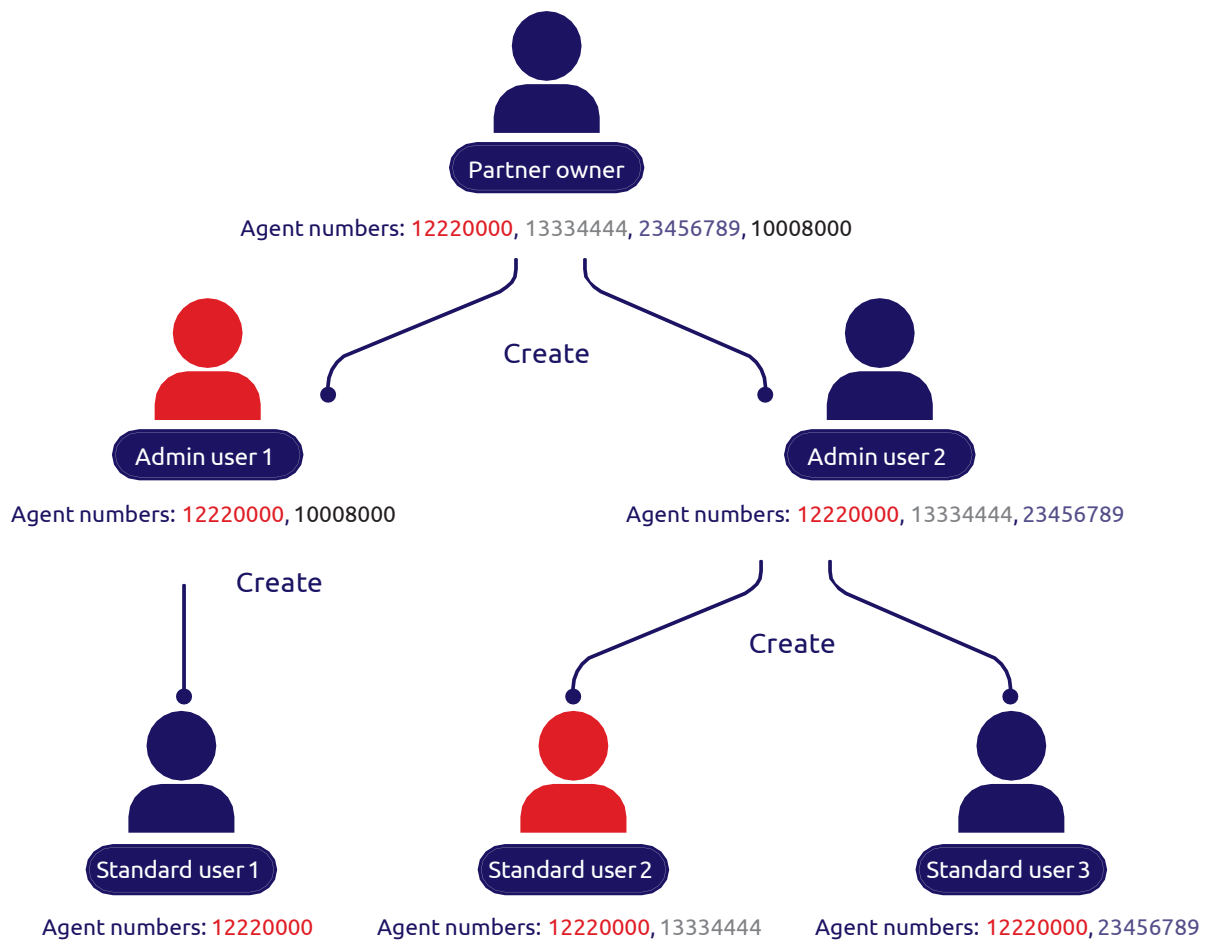▶ Please enter the required details and click "Add account".

1 If the same email address already exists, an error message will be shown.

2 The list of agent numbers is assigned by MSIG admin or partner owner.
(Please refer to the explanation on the next page)

3 Standard user has no privilege of managing other users, while administrator can manage users except partner owner.

4 Once created, the user shall receive an activation email.

Agent number assignment example

Partner owner

Agent numbers: 12220000, 13334444, 23456789, 10008000

Create

Admin user 1

Agent numbers: 12220000, 10008000

Admin user 2

Agent numbers: 12220000, 13334444, 23456789

Create

Create

Standard user 1

Agent numbers: 12220000

Standard user 2

Agent numbers: 12220000, 13334444

Standard user 3

Agent numbers: 12220000, 23456789

User enquiry

▶ Click "User enquiry" Under "Account management" to search user by entering the full name, email or agent number.

For partner owner, all users are shown on the list, while for admin, the partner owner is not shown.

User can only be edited by users in upper hierarchy. For example, partner owner can edit admin, but admin cannot edit another admin or itself.

For standard users without administration privileges, only self-service facilities, such as profile update, change password and security, are provided.

You can click "Edit" to edit the user details.

Home > Account Management >
User Enquiry

Please enter any one of the fields for the search.

| Name | Email Address | Agent Number |

Clear   Search

Search Result 3

Name ⇕	Email Address ⇕	Role ⇕	Agent Number	Action
Chan Tai Man	chantaiman@gamil.com	Administrator	1200035 +4 more	✏
				Edit
Wong Siu Ming	wongsiuming@gamil.com	Owner	1200035 +2 more	✏
Chan Siu Ling	chansiuling@gamil.com	Standard User	1200035	✏

Item per page: 10 ⌄   1-3 of 3 < 1 >
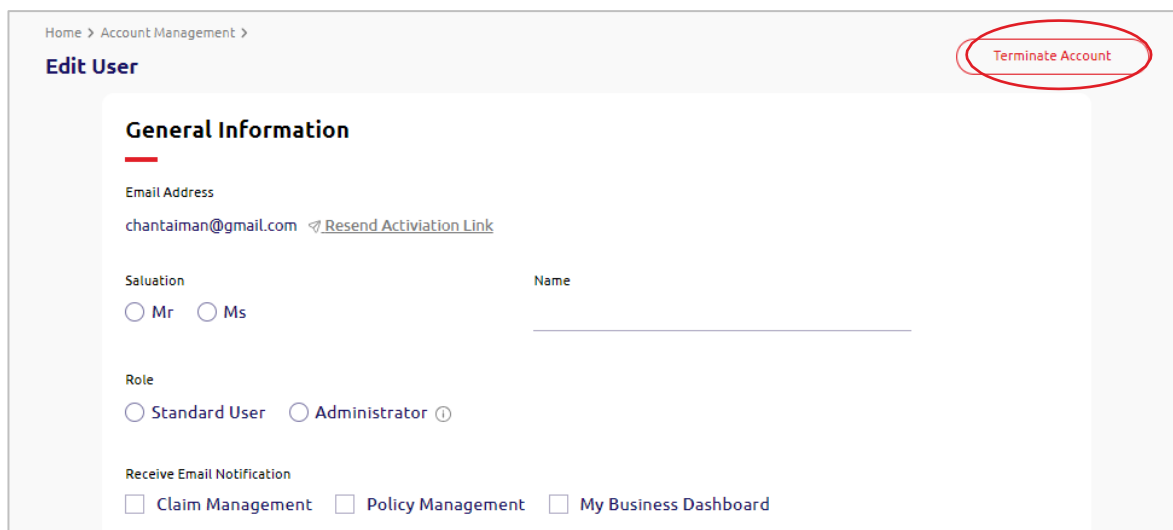
Terminate user

▶ After clicking "Edit" to edit the user details, you can terminate a user by clicking the "Terminate account" button.

A confirmation dialog will be shown. When the user is terminated, it cannot be enabled again.

The terminated user will free up the original email for use later. For example, peter@mail.com of ABC company is "Terminated". Another company DEF can then add peter@mail.com.

Useful information

User guide

▶ To access the user guide for EASYi Claims and Policy Management Portal, you can either click the action button "View file" to view the user guide or click "Download" to save a copy to your device.

Product brochure

▶ You can access product brochures for our various products under "Useful information". Simply choose the brochure you need and either click "Download" to save it to our device or click "Email me" to send it to your clients right away.

For enquiries, please contact your MSIG account handler.

For more information, please contact
your account handler.

如欲了解更多，請聯絡您的客戶主任。

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