ASSOCIATION BOARD TRAINING

Claims Command Center

Board Member Training Guide

From login and dashboard review through reporting, repairs and closeout

October 13, 2026

claims.myhomespot.com

myhomespot.com

myHomeSpot Claims Command Center Board Member Training

From first report to completed recovery

Use the Claims Command Center to report a loss, read dashboard totals, create reports and follow recovery through closeout. Start with the first board question and confirm the association and loss event before saving a record.

Website: https://claims.myhomespot.com
Audience: Board members with administrator-approved association access.
Guide date: October 13, 2026. Operational screenshots use fictional training records.

Choose the instructions for your access

Full system access gives you dashboards, reports and operational editing for your assigned associations. Follow the editing steps for work assigned by the manager. **Portal-only access** gives you the first question, insurance documents, approved progress and shared notes; ask the manager to maintain the operational records.

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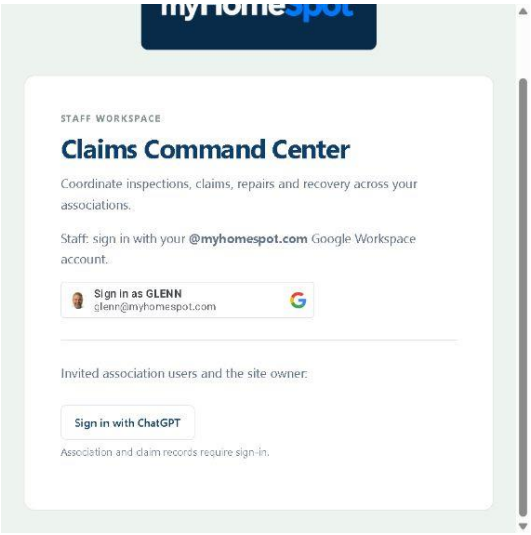
Practice with your manager: Use a designated training workspace for record-entry practice. Use your own approved account and the correct association for live updates.

Step 1 Sign in and obtain access

1. Open claims.myhomespot.com, or open the invitation link sent to you.
2. Under **Invited association users and the site owner**, choose **Sign in with ChatGPT**. The Google Workspace option shown above it is for myHomeSpot staff.
3. Use the ChatGPT account with the exact email address invited by your manager. Complete the normal sign-in prompts.
4. On your first visit, check **Signed in as** on the **Association access** page. If the email is wrong, choose **Use another account**.
5. When your invitation appears, choose **Request access**. Tell the association manager you have requested access. An administrator verifies and approves the request.
6. After approval, select **Refresh access**, then **Open workspace**. Full-access members open the Command Center; portal-only members open the association portal.
7. For later visits, return to the website and sign in with that same approved account. Check that the correct association is available.

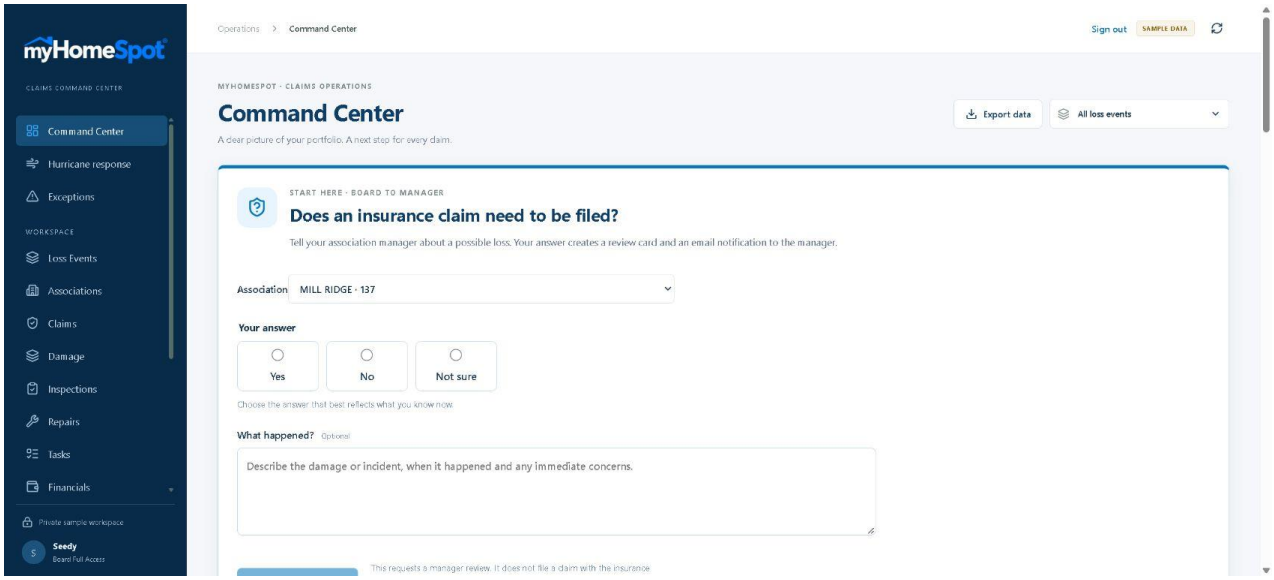


Board members select Sign in with ChatGPT near the bottom of the sign-in card.

If access is not ready: Invitations expire after seven days. Ask your manager to renew an expired invitation or correct the invited email. Signing in alone does not grant access. You cannot turn on your own full access or assign yourself another association.

Step 2 Report the possible loss

Your first action is the card **Does an insurance claim need to be filed?** It appears before the operational dashboard. If several associations are assigned to you, choose the association in this card. In the full workspace, also choose the applicable **Loss event scope** at the top when the event is already known.



Example from the sample workspace showing the first board-to-manager question.

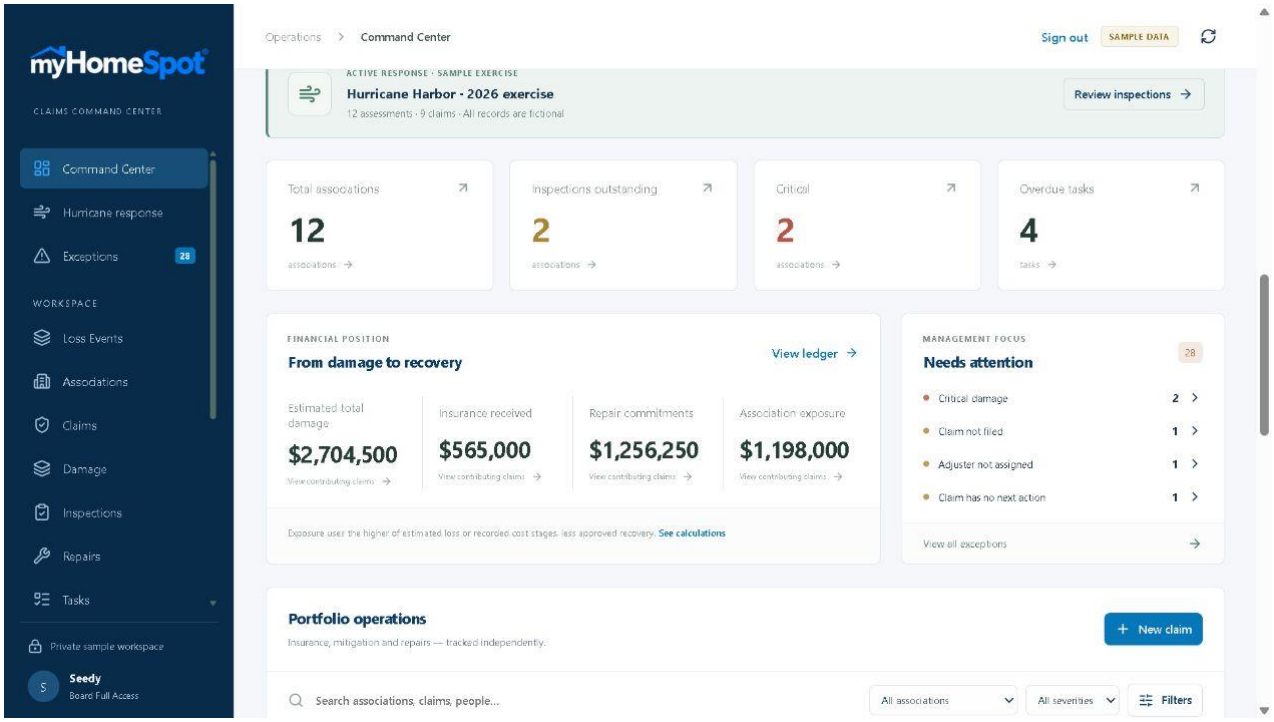
1. Choose **Yes**, **No** or **Not sure** based on what you know now.
2. Enter **What happened?** For Yes and Not sure, details are required. Include the incident or damage, date and immediate concerns. For No, details are optional. A specific location is helpful when known but is not required.
3. Select **Submit to manager**. Look for **Response recorded for your manager** and the selected answer.
4. Check **Manager email** and open **Previous responses** to see the recorded answer and review status.

What happens next: The response creates a manager review card and queues an email notice, including for a No answer. Yes and Not sure initially show Needs review; No initially shows Recorded. Staff can then mark the review Acknowledged, Reviewing or Resolved. Board members see the status; private manager review notes remain with staff.

This step does not file a claim with the insurer. The manager coordinates the filing decision and carrier contact. Submitted to email service means the service accepted the message; inbox delivery is not confirmed. If sending has a problem, your saved response can still exist. Contact the manager rather than repeatedly submitting the same incident solely to resend an email.

Step 3 Use the Command Center dashboard

Select **Command Center** in the navigation, then scroll below the first claim question and insurance library. Choose **Loss event scope** at the top. Use All loss events for an overall view, or choose the named hurricane or incident. These dashboard and reporting tools require Full system access.



Fictional training example showing the event banner, four count cards, financial totals and Needs attention.

Dashboard card	How to read it
Total associations	Assigned associations represented in the selected event; all assigned associations when All loss events is selected.
Inspections outstanding	Associations with an assessment that has not reached Inspection completed.
Critical	Associations with a Critical assessment, using the linked claim's severity when present.
Overdue tasks	Unfinished tasks with a due date before today. This is a task count, not an association count.

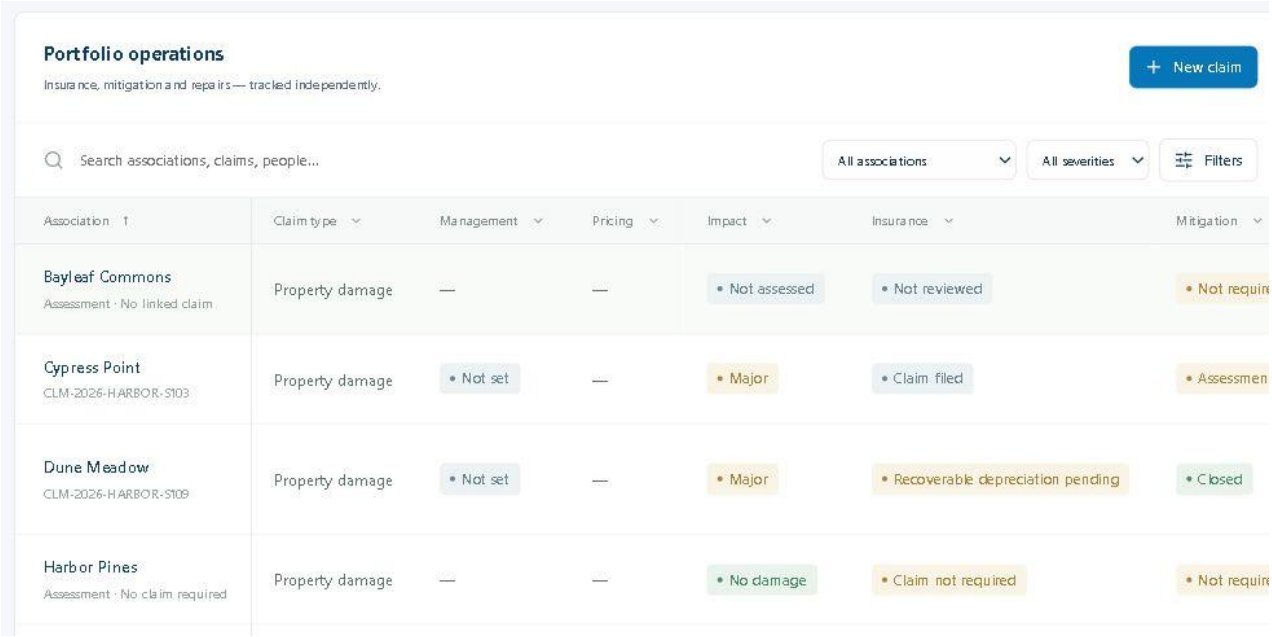
Click a card to open the contributing records. Check the small label to see whether it counts associations, claims or tasks. Open a record in the first column for details, then return through Command Center. Card clicks clear earlier table filters; reapply your association filter when needed.

Scope matters: The loss event changes the dashboard cards. Search records, Association filter and the other table filters narrow the list below; they do not recalculate the large count cards, financial cards or Needs attention totals. All associations means the associations assigned to your account.

Read financial totals and the operations table

Financial card	What the saved records show
Estimated total damage	Estimated loss transactions recorded in the claim financial ledger. Damage-item planning estimates alone do not change this total.
Insurance received	Recorded insurance, advance, ACV, RCV, supplement and recoverable depreciation receipts.
Repair commitments	Contract commitments plus change orders; this is different from invoices or contractor payments.
Association exposure	Expected cost remaining after recorded approved or received recovery. It is a calculated estimate, not an insurer's coverage decision.

Click a dollar card to review contributing claims. **View ledger** and **See calculations** open Financials; expand **How totals are calculated** there for the calculation explanation. A zero amount can mean that the financial entry has not been recorded yet.

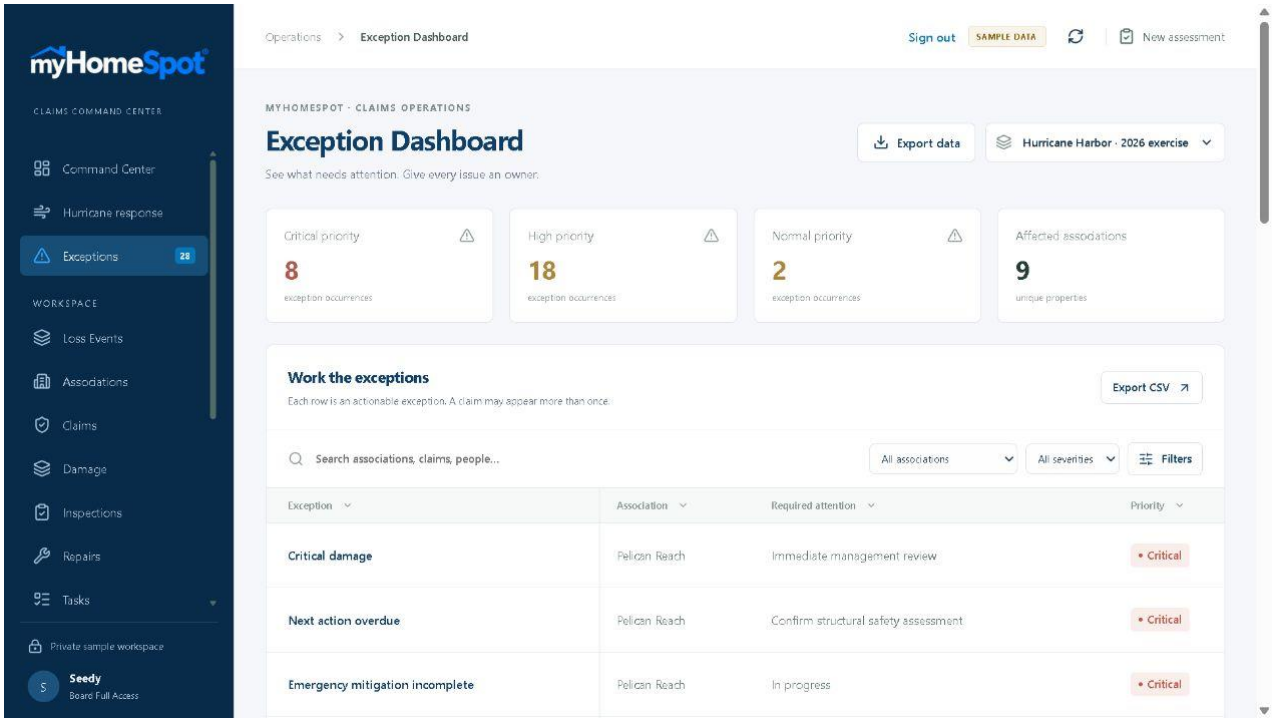


Portfolio operations retains claim records and assessment-only records, with search, association and severity controls.

1. In **Portfolio operations**, select **Association filter**, enter **Search records** or use **Filters** for additional criteria. **Clear** removes table restrictions and leaves the event selection in place.
2. Read Insurance, Mitigation and Repairs separately. Scroll the table horizontally to see Next required action, financials, Action owner, Due date and Days since update. Click a column heading to sort; click it again to reverse the order.
3. Open the association or claim in the first column. For a completed assessment confirming no damage, no claim and no further work, the table shows Claim not required and No work required. An assessment-only row opens the association; it does not need a new claim merely to appear in this table.

Use hurricane indicators and exceptions

Select **Hurricane response** for the Hurricane Command Center. It opens **All operational and financial indicators** below the operations table. In Command Center, select that disclosure to expand it. Use the indicators to review inspections, severity, claims filed, adjusters, mitigation, repair progress, payments, supplements and closure.



Exception Dashboard example. Priority cards count issue occurrences; Affected associations counts unique properties.

1. On the home dashboard, review **Needs attention**. Select a category such as Claim not filed or Claim has no next action to see affected associations. Choose **View all exceptions**, or **Exceptions** in navigation, for the individual issue list.
2. In **Exception Dashboard**, choose Critical priority, High priority or Normal priority to narrow the issue list. Set Association filter when needed. A claim may have several exception rows, so the count can exceed the number of affected associations.
3. Read **Required attention** and click the exception name in the first column. It opens the related claim, task or assessment. Coordinate the response with your manager and give the follow-up a responsible person and due date.
4. Save the appropriate record update, then use **Refresh data** and review the issue again. Exceptions are calculated from saved records; opening the list alone does not resolve them.

Check the context of overdue work. A task linked to a claim follows that claim's event; a general association task can also appear when its association participates in the selected event. An empty list may reflect filters. Check the event and use Clear before concluding that no issues remain.

Step 4 Find insurance and supporting documents

Open the association insurance library

1. Confirm the association in the first question card. The **Insurance policy documents** library is directly below it. Full-access members can also open the association workspace.
2. Use **Search insurance documents** to find a filename, carrier, year or category. Use **File year** to narrow the list. Select All years to return to the complete library.
3. Choose **Open document** or **Open collection**. Egnyte opens in a new tab. A collection may contain several policy documents; select the intended file there.
4. Choose **Source location** to see the source folder. Use **Previous** and **Next** to move through document pages.
5. Review the named insured, effective dates and document type with the manager. Historical policies, endorsements, certificates and notices are included. A file year is a search aid and does not establish coverage for a loss.

If the library says a folder is empty, files are missing or an identity review is needed, ask the manager to confirm the documents. If an Egnyte link will not open, give the manager the association, filename and error shown.

Add evidence when you have full access

1. Have photos, estimates, reports or invoices saved in the association's appropriate Egnyte folder and obtain the correct share link. The website stores links; it does not upload the original files to Egnyte.
2. Open the related claim and its **Documents** tab. Select **Add document link**. You can also use **Documents** in the navigation.
3. Enter **Document title**, **Document type**, **Date** and the **Egnyte URL**. Confirm Association and Related claim. Add a document version if helpful, then choose **Save document link**.
4. When the document should appear in the approved-information portal, select **Approved for board view** as agreed with your manager. Open the saved link to verify it works.

Find your records in the full workspace

Select the loss event at the top and use the **Association filter** or **Search records**. Open an association or claim by clicking its name or ID in the first column. Use **Clear** if a filter hides the expected record. On a phone, open **Open navigation** before choosing a section. Wide tables scroll horizontally.

Step 5 Document the assessment

Full-access editing steps. Portal-only members provide observations and photos to the manager and follow the resulting approved updates. Check for an existing assessment for the association and event before creating another one.

1. Open **Inspections**, or open the association workspace and its **Event assessments** section. Use **Record inspection** or **Review inspection** for an existing assessment. For a new record, choose **Add assessment**.
2. Confirm **Association**, **Loss event** and **Assessment template**. Use Property damage inspection for the standard property inspection. Existing saved assessments retain their original template.
3. Record the **Inspection status**, **Inspector**, **Inspection date** and **Overall severity**. Use the section buttons to review Building & siding, Gates & elevators, Grounds & irrigation, Pool and Safety & access.
4. Read each question carefully: Yes to Generator working? has a different meaning from Yes to Roof damage? Use Yes, No, Not checked or Not applicable accurately. Leave uninspected items Not checked. Record access restrictions and observations in **Inspection narrative**, and add the **Egnyte photo folder** link when available.
5. Record **Emergency mitigation required**, **Follow-up required** and **Claim required** based on the manager's confirmed next step. Give any follow-up a due date.
6. Use **Inspection completed** only when the assessment is ready. Completion requires the inspector, date, a completed severity result and any required template answers. Select **Save assessment** and verify the saved record.

Follow the confirmed no damage path

When the responsible reviewer confirms no damage, record **Overall severity: No damage**, **Inspection status: Inspection completed**, the reviewer and date, and a narrative explaining the basis. Clear **Claim required**. If no work is needed, also clear Emergency mitigation required and Follow-up required. Save the assessment.

The completed no-damage assessment can show **Claim not required**, repairs **Not required** and **No work required** in the Command Center. Retain it as the event record; a property claim is not needed for that all-clear result. Review existing tasks separately and complete or cancel them with an accurate note. If a claim already exists, this assessment does not close it; follow that claim's documented decision and Closeout workflow.

A No answer in the first card does not complete this assessment. Record an administrative confirmation as such in the narrative; do not describe it as a physical inspection. If an area cannot be checked, document that limitation and the required follow-up. An unsafe or uninhabitable building answer creates an exception for follow-up; recording it does not arrange an emergency response.

Step 6 Build the claim and damage record

Create or update the case after manager direction

1. Open **Claims** and search the association and event. Open the existing case when one is already present. For a new case, choose **Add claim**. The Command Center and association workspace also offer **New claim**.
2. Choose the **Claim type**. Property damage is the master property case for an association and event. Personal injury, Liability, Third-party recovery and Other can be separate cases under the same incident.
3. Complete Association, Loss event, Date of loss, Impact / severity, Claim owner, Priority and the three status fields. Record the incident summary and known carrier information. If Management status is Managed, select the agreed Hourly or Percentage Management pricing.
4. Select **Save claim**. If an assessment belongs to this case, open it, select **Related claim** and save. Claim IDs connect damage, tasks, documents and finances.
5. After carrier filing actually occurs, update **Claim filed**, **Date reported**, **Carrier claim number** and **Insurance status** from confirmed information. Date reported is required when Claim filed is checked. Saving a website case does not submit it to the insurer.

Use an existing **Loss event** when available. If the manager directs you to create a new incident, open Loss Events and select New loss event; enter the name, type, start date and status. Full-access board members can create events for their assigned associations. Ask staff to update an event shared beyond your scope.

Record each damaged component

1. Open the claim's **Damage** tab or Damage in the navigation and select **Add damage item**.
2. Confirm Association and Related claim. Enter Component, Description, Severity, Date identified and Repair status. Use Building or Location to distinguish an area. **Location (optional)** may be blank for damage at the claim site; the list then displays Claim site.
3. Add available photos, estimates, cause, contractor, scope and planning cost. Record emergency and repair information at the stage actually reached. Choose **Save damage item**.
4. Open the item and choose **Update damage item** to update Repair status, Percent complete and completion dates. Review whether Approved for board view should be selected.

Component choices include: Roof, Elevator, HVAC, Electrical, Pool, Fencing, Windows, Exterior walls, Common area interiors, Landscaping, Dock, Parking area, Building envelope, Signage, Storage building, Mitigation, Tree service, Siding, Generator, Access controller, Gate hardware, Other structure and Other.

A damage item's Estimated cost is a planning value. It does not automatically add an Estimated loss transaction to the claim's financial ledger.

Step 7 Track tasks mitigation and repairs

Give each next action an owner and date

1. Open the claim's **Tasks** tab or Tasks in the navigation and choose **Add task**.
2. Enter Task title, Association, Priority and Task status. Link Related claim and Damage item where appropriate. Add Assigned person, Due date, Category and a description explaining the result needed. Choose **Save task**.
3. Update the task as work starts or waits on the carrier, vendor, board or another party. A waiting status keeps the task open.
4. When finished, use **Complete** or edit the Task status to Completed. Enter an accurate **Completion note** and date, then save. Use Cancelled when the task is no longer needed, recording why it was cancelled.

Update three independent progress tracks

Track	Examples of progress	Where to update
Insurance	Claim preparation, Claim filed, Carrier evaluating, Payment received, Insurance complete	Edit claim
Mitigation	Assessment required, Authorization required, Vendor assigned, In progress, Monitoring, Complete	Edit claim
Repairs	Scope development, Board approval required, Scheduled, In progress, Final inspection, Punch list, Complete	Edit claim and repair activity

Changing one track does not complete the other two. If mitigation or physical repairs are unnecessary, record Not required for that track. Keep the claim's **Next required action**, **Responsible person** and **Next action due** current.

Track a repair activity

1. Open the claim's **Repairs** tab or Repairs in the navigation and choose **Add repair activity**.
2. Confirm Association and Related claim. Enter **Repair activity** and **Repair status**; add Damage item, Contractor, Scope, start date and due date as known. Choose **Save repair activity**.
3. Update Percent complete and status based on verified progress. Record delays and remaining punch-list work. Use the actual completion date after completion is confirmed.
4. Link the supporting estimate, contract, invoice and final photographs under Documents. Confirm the damage item, repair activity and overall claim repair status agree.

Recording Board approval required, Approved or Contract pending records the workflow stage. Coordinate the actual approval and contractor authorization with the manager, then attach the supporting record.

Step 8 Review finances and keep the board informed

Review and record the financial stages

Open the claim's **Financials** tab to review recovery, costs and association exposure. Work with the manager or accounting contact before entering or correcting amounts. Recording an entry here does not make a payment or reconcile a bank account.

1. For an assigned entry, choose **Add financial transaction**. Confirm Association and Related claim. Enter Transaction type, Vendor or payer, Description, Transaction date, Amount ($) and State.
2. Choose the correct type: Estimated loss for the overall loss estimate; insurance receipt types for actual insurance money received; Contract commitment, Change order, Invoice and Vendor payment for their respective cost stages. Add the reference and Egnyte supporting document, then select **Save financial transaction**.
3. Record each receipt or cost once. Component estimates do not change ledger totals. Do not duplicate a mitigation or professional cost as both a standalone expense and a contract commitment. Approved amount and Paid amount reference fields are not separate payment transactions.
4. If an entry is wrong, coordinate the correction, set State to **Void** with a reason where appropriate, then record the correct entry. Verify the refreshed totals.

Carrier approved recovery is the total approval net of the deductible, including approved supplements. Insurance received is based on receipt entries. Association contributions fund the association's exposure; they do not reduce the loss ultimately borne by it. For recovery from another party, use the claim's **Recovery** tab and **Record recovery received**; avoid counting the same payment under both insurance sources.

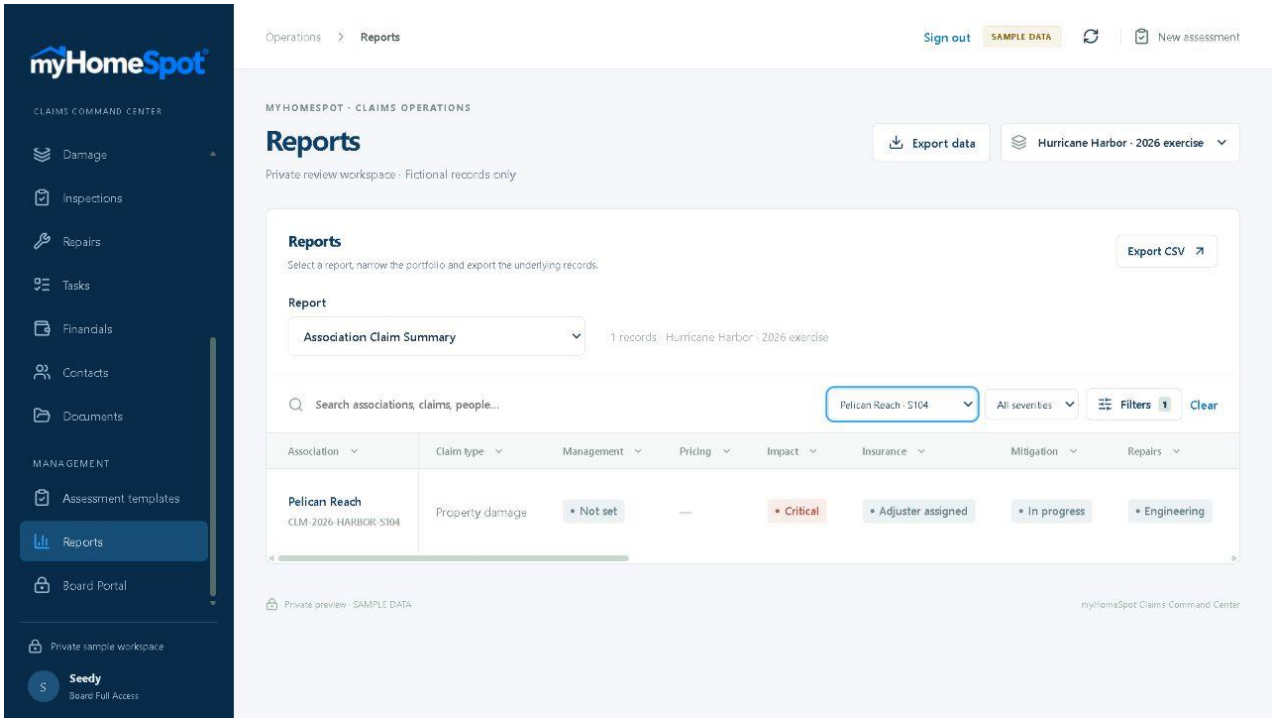
Publish a useful update within the association

1. Use **Shared association notes** for an association-wide update, or **Claim notes** for that case. Enter the note and select **Post note**. Posts identify your signed-in account and time. Add a follow-up correction if necessary; posted notes cannot be overwritten.
2. In the full workspace, use **Edit claim** to maintain the **Board-visible summary** and **Board next milestone**. Use the Timeline tab for a dated operational update; mark Approved for board view when appropriate.
3. Open **Board Portal**, then **Open board preview**, or visit claims.myhomespot.com/board. Check approved claim summaries, Damage & repair progress, recent updates, milestones and Board documents.
4. In the portal, turn on **Email me about all changes to my associations** if you want change notices. Look for Preference saved. This covers your assigned associations and is separate from the first card's manager notification.

For board meeting records, use **Export data** or **Export association**. Choose the scope and report, then download. These exports include all loss events in the selected association scope; page filters do not limit them. Use Reports or a section's filtered CSV for a narrower view. Notes and downloads do not change statuses or amounts.

Step 9 Create a report for the board

Full-access board members select **Reports** in navigation. Portal-only members ask the manager for the required report and follow approved updates in the board portal. Reports show underlying records; they do not change claim status.



Fictional example of Association Claim Summary filtered to Pelican Reach and the Hurricane Harbor exercise.

1. Choose **Loss event scope**. For one hurricane or incident, select that event rather than All loss events.
2. Choose the **Report**. Association Claim Summary is a starting point for a general review. Set **Association filter** to the association being discussed.
3. Use **Search records**, Damage severity filter or **Filters** to narrow the report. Advanced choices include insurance and repair status, claim type, priority, carrier, adjuster, open/closed state, exposure and update age.
4. Check the record count and event name. Scroll horizontally to review status, next action, owner, due date and financial amounts. Open a claim or task when you need to confirm the underlying record.
5. Select **Export CSV** inside the Reports panel to download the currently filtered report. Open the file in Excel or another spreadsheet program; adjust the column widths and review the association and event before printing or using it in meeting materials.

If no rows appear: Check the report choice, event, association and persistent filters, then use Clear. Claim reports do not contain assessment-only no-damage records or the first question's manager review requests. Find those in the dashboard, Inspections and Previous responses.

Choose the report that answers your question

General review and completion

Executive Claim Summary, **Hurricane Event Summary**, **Association Claim Summary** and **Claim Closeout Status** currently show the same claim record list for the selected scope. Choose the event and association yourself. These names do not create different aggregations or automatically restrict the list to completed cases. For a closeout decision, open the claim's Closeout tab.

Case status and claim type

- **Open Claims** shows claims with no closed date and no Insurance status Closed. **Closed Claims** shows the closed cases.
- **Critical Claims** shows claims with severity Critical.
- **Personal Injury Claims** and **Liability Claims** show those claim types.
- **Third-party Recovery** shows third-party recovery cases or claims with a recovery amount sought.

Follow up and missing information

- **Overdue Items** lists unfinished overdue tasks. It is a task report; check the related claim or association context.
- **Carrier Aging** lists claims at Claim filed, Carrier evaluating, Information requested or Supplement under review. Read Days since update and the recorded next action; the report has no separate age buckets.
- **Adjuster Assignments** shows claims with an adjuster recorded.
- **Claims With No Recent Update** shows active claims beyond the configured update threshold. **Claims Without Next Action** shows active claims missing an action, owner or due date.

Repair progress

Repairs in Progress includes In progress, Substantially complete, Final inspection and Punch list. **Repair Delays** includes claims whose Repair status is Delayed.

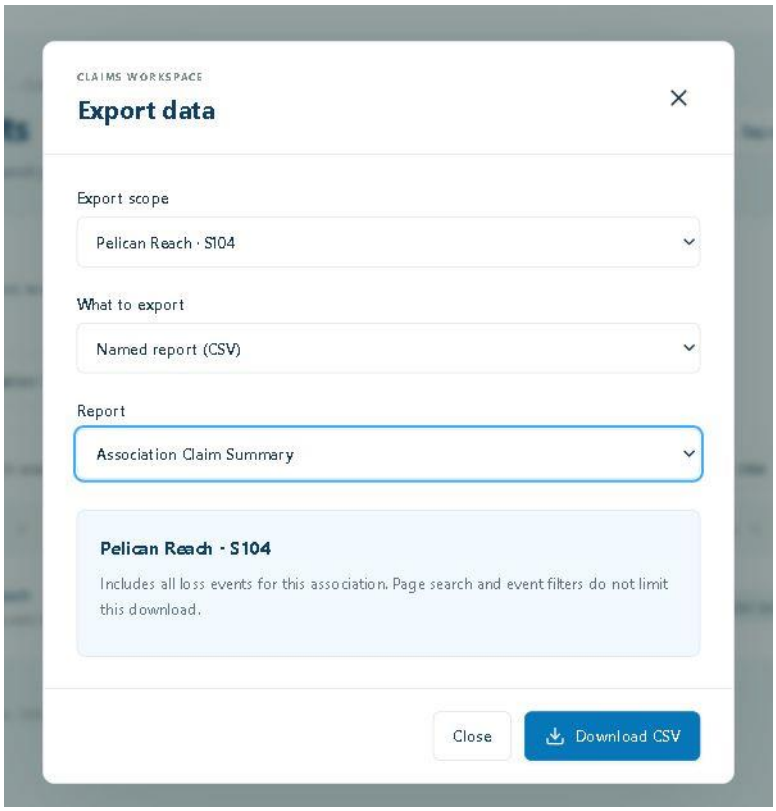
Money and outstanding recovery

- **Financial Exposure** shows claims with calculated exposure greater than zero.
- **Insurance Payments Received** shows claims with recorded insurance proceeds greater than zero.
- **Supplements Outstanding** shows requested supplements greater than the approved amount.
- **Recoverable Depreciation Outstanding** shows expected recoverable depreciation not yet collected.

For a board meeting, a useful review set is Association Claim Summary, Open Claims, Financial Exposure and the relevant repair or overdue report. Apply the same association and event context to each and check the source records with the manager.

Download a filtered report or broader data

Use **Reports > Export CSV** for the report currently shown, including its event and table filters. Use the top **Export data** button for a broader download of one association or all associations assigned to your account.



The export dialog states that its download includes all loss events in the chosen association scope.

1. Select **Export data**. Choose **Export scope**: the intended association or All assigned associations.
2. Choose **What to export**. Select a record collection such as Claims, Financial ledger or Inspections & assessments; use **Named report (CSV)** for a report; use All data (JSON) for structured data.
3. When Named report is selected, choose the **Report**. Read the scope summary, then choose **Download CSV** or **Download JSON** as displayed.
4. Review the downloaded file before using it. Record the association, loss event selection where applicable and download date with the board materials.

Important scope difference: Export data includes all loss events for the selected association scope. The download is controlled by Export scope shown in the dialog. Your current association filter may preselect that scope. Page search, severity and other table filters, and the event selector do not limit the download. For a named report limited to one event, return to Reports, apply the event and filters there, and use Export CSV.

Export association opens this dialog for one association. **Association reports** opens Reports for that association and resets the event to All loss events; select the specific event afterward. CSV opens in a spreadsheet program; JSON is structured data for review or transfer. A scoped board JSON file cannot restore the entire workspace.

Step 10 Verify and complete closeout

Coordinate final approval with the manager. Full-access board members assigned to closeout can open the claim's **Closeout** tab. Portal-only members confirm the approved outcome and ask the manager to complete the operational records.

1. Review the final scope, inspections, photographs, documents, insurance outcome and financial totals. Verify the board summary explains what happened and the result.
2. Review every task linked to the claim. Complete finished tasks with a Completion note, or cancel tasks no longer required with an accurate explanation.
3. Confirm mitigation and repairs are **Not required**, **Complete** or **Closed**. Resolve outstanding recovery, supplements, depreciation, unpaid invoices and remaining commitments with the manager or accounting contact.
4. Check each applicable item in **Claim closeout** only after its underlying requirement is satisfied. Select **Save checklist** if the review is still in progress.
5. When every check and remaining balance is resolved and approval is obtained, select **Approve & close claim**. Read and confirm the closing prompt.
6. Verify a closed date and Insurance status Closed. The Command Center's next-action display should show **Closed & reconciled**. Open the board preview and confirm the final summary and documents are available.

Property claim closeout checks

[ ] Repairs completed [ ] Final inspection completed

[ ] Punch list completed [ ] Final contractor invoice received

[ ] Contractor paid [ ] Required lien releases received

[ ] Insurance proceeds reconciled [ ] Supplement resolved

[ ] Recoverable depreciation collected or waived [ ] Board update completed

[ ] Final photographs stored [ ] Final documents linked

[ ] Financial reconciliation completed [ ] Open tasks completed

[ ] Claim summary completed [ ] Closeout approved

Cases with repairs marked Not required, and nonphysical cases, use a shorter checklist covering incident documentation, carrier response, claim outcome, recovery or not applicable, board update, final documents, finances, tasks, summary and closeout approval. Follow the checklist displayed for that claim.

If closeout is blocked: Resolve the specific message rather than changing accurate amounts or checking unfinished work. The system checks the checklist, linked open tasks, mitigation, repairs and outstanding financial balances. Merely selecting Insurance complete does not close the case. If new work is discovered after closure, an assigned full-access user can coordinate **Reopen claim** with the manager.

Keep the completed case and final documents as the record of the outcome. Closing an individual claim does not close a loss event shared by multiple associations.

Final visit checklist and help

Check these items on each visit

- I am signed in with my own approved account and have selected the correct association and loss event.
- I checked Previous responses for the manager's review status and avoided duplicate incident submissions.
- The assessment describes what was actually checked, any limitations and the confirmed claim or no-claim decision.
- For an active case, the next action has a responsible person and due date; tasks and progress reflect what actually happened.
- Supporting Egnyte links open correctly, and approved board information is current.
- Financial entries and final closeout were verified with the manager or accounting contact.

Resolve common problems

What you see	What to do
No current invitation or awaiting approval	Check the signed-in email. Ask your manager to prepare or renew the invitation, or approve the pending request. Refresh access after approval.
Wrong or missing association	Check Association filter and Loss event scope. Use Clear. If the association is still absent, ask the administrator to review your assignment.
Missing edit buttons or permission denied	Confirm your access mode with the manager. Portal-only users supply updates to the manager; only the administrator changes access.
Form will not save	Read the highlighted error and complete required fields. A completed assessment needs inspector, date and severity; a completed task needs a note.
Record changed while editing	Refresh the record, review the latest saved information and enter your update again. Verify the saved result.
Email queued or failed, or link unavailable	Check whether the response is already recorded. Give the manager the association, record ID or filename and the message shown.
Claim will not close	Resolve the named checklist item, task, progress track or outstanding balance with the manager.

Finish the session

In the full Command Center, select **Sign out** at the top right. The portal-only page currently has no visible Sign out button; open claims.myhomespot.com/join and choose **Use another account** to leave or switch the application account. On desktop, hover over an action or focus it with the keyboard for help; Escape dismisses the tooltip.