SHIELDSPHERE

Employee and Client Portal

your site's safety information, one sign-in link away

How employees and client viewers sign in with an emailed link, read and acknowledge policies, sign off on toolbox talks, report incidents and hazards, and look up safety data sheets, plus how the administrator who invites them decides what each site shows.

USER GUIDE – FOR EVERYDAY USERS | VERSION 1.0 | SCREENS CAPTURED NOVEMBER 2026

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ShieldSphere's Employee and Client Portal is a simple, separate site where employees and client viewers sign in with an emailed link, no password needed. They read and acknowledge policies, sign off on toolbox talks, report incidents and hazards, and look up safety data sheets. An administrator decides which areas each site shows.

1 What the portal does

The portal is the part of ShieldSphere that is built for people who do the work, not for the people who manage the safety program.

You do not see the full ShieldSphere dashboard. You see a short list of tiles, one for each area your site has shared with you. Everything on the portal is aimed at one of three jobs: read something, confirm that you read it, or tell the safety team about something you saw.

There are two kinds of portal user:

Employee

A person on your company's employee list who has been given portal access. Employees can read, acknowledge, sign off and report. Only employees see the reporting tiles and My Training.

Client viewer

A read-only guest, typically a client of a safety consultant. Client viewers can look at what has been shared with them. They cannot report incidents or hazards and have no personal training page.

The home screen shows your role in the page header, as **Employee** or **Client viewer**, next to the name of your site.

2 Words you'll see

WORD	WHAT IT MEANS
Sign-in link	The one-time link emailed to you. It replaces a password.
Acknowledge	Press a button to record that you read a policy or a Job Hazard Analysis. The date and time are saved.
Sign off	The same idea for a toolbox talk: you confirm you took part.
Safety admin	The person at your company who runs ShieldSphere and who the portal tells you to contact when something is missing.
Site	The workplace location your account belongs to. The portal shows you information for your site only.
Finalized	Complete and approved by the safety team. Inspections, Job Hazard Analyses, procedures and committee minutes only appear on the portal once they are finalized.

3 Sign in with an emailed link

You never choose a password for the portal. Each time you sign in, ShieldSphere emails you a link.

1. ### Open the portal sign-in page

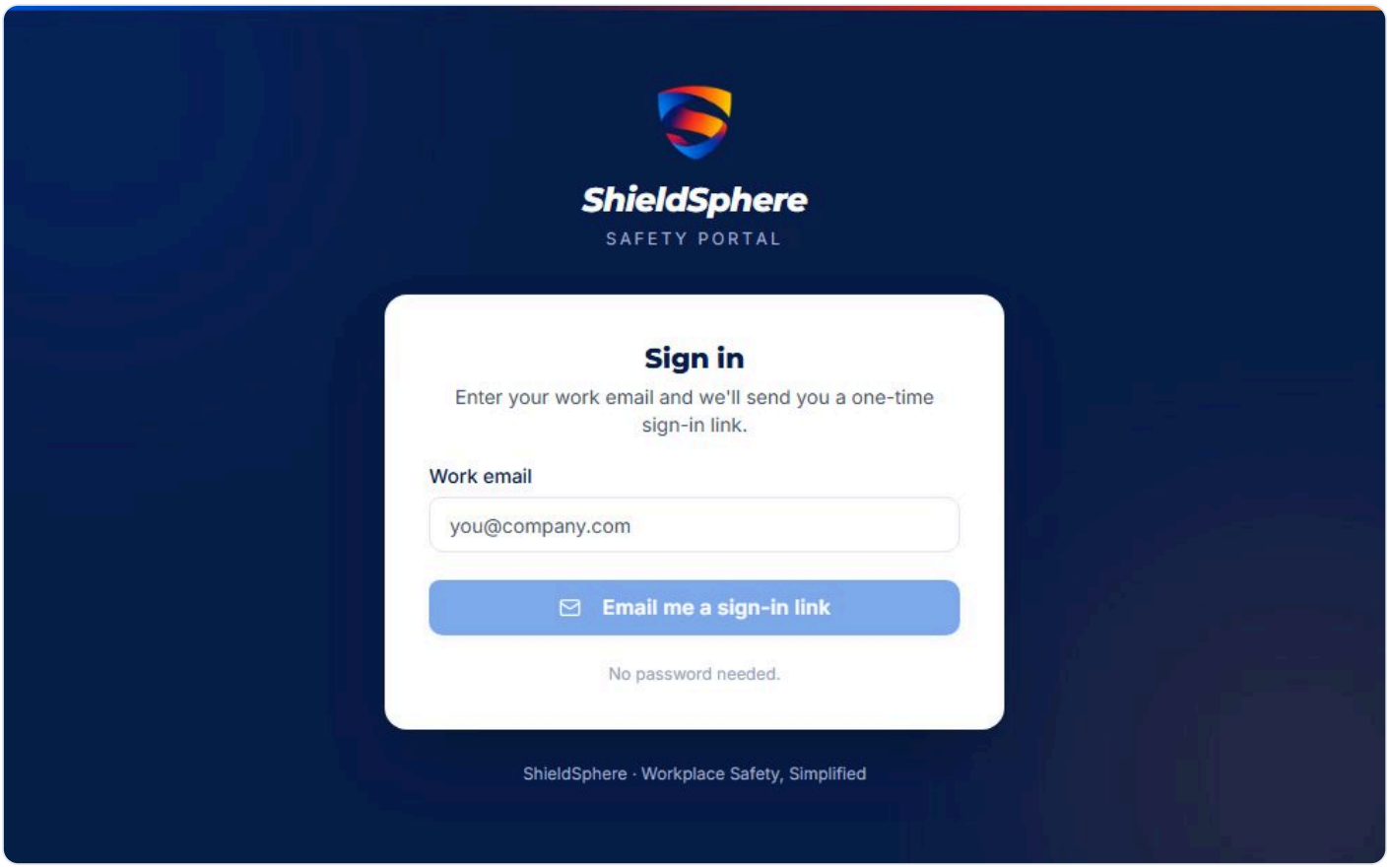
   Use the link from your welcome email, or go to the portal address your safety admin gave you. The page is titled **Safety Portal** and says **Sign in**.

2. ### Enter your work email and ask for the link

   Type your **Work email**, then press **Email me a sign-in link**. Use the same address your employer has on file for you.

3. ### Open the email and tap the button

   The screen changes to **Check your email**. The message is titled *Your ShieldSphere Safety Portal access*. The link is valid for one hour and works once. If it never arrives, check your spam folder, or press **try again** on the sign-in screen.



Signing in. One field and one button. No password is involved.

THE SAME MESSAGE EITHER WAY

After you press the button, the screen always says the link has been sent *if* your email is registered. That is deliberate, so a stranger cannot use the page to find out who has access. If no email arrives, the likely reason is that your administrator has not granted you access yet.

ONLY SO MANY TRIES PER HOUR

Requests are limited. If you ask for several links in a row, further requests quietly stop being sent for a while. Use the latest email you received and wait before asking again.

4 Your home screen and what decides it

The home screen greets you by first name and shows one tile for each area open to you. Two things decide which tiles appear: what your administrator has switched on for your site, and your role.

TILE	WHAT YOU DO THERE
Safety Policies	Read each policy and acknowledge it.
Safety Data Sheets	Look up the data sheet for a chemical at your site.
Toolbox Talks	Read a safety briefing and sign off.
Lockout/Tagout Procedures	Open the written procedure for a piece of equipment.
Job Hazard Analyses	Review hazards, controls and PPE for a task, and acknowledge the ones your role requires.
Inspections	Download completed inspection reports.
OSHA 300 Log	View the recordable injury and illness cases for your site.
Resources	Browse and download shared company files.
My Training	See your own training records and certificates. Employees only.
Safety Committee	See who is on the committee and read finalized meeting minutes.
Report an Incident	Report an injury, illness or near-miss. Employees only.
Report a Hazard	Flag an unsafe condition or act, give credit, or share an idea. Employees only.

Why a tile might be missing

- **Your administrator turned it off for your site.** Each site has its own on and off switches. For a company that manages its own safety program, Job Hazard Analyses, Inspections and the OSHA 300 Log start out off, and everything else starts on. For a safety consultant's client sites, everything starts on. The administrator can change any of them.
- **The tile is for employees only.** Report an Incident, Report a Hazard and My Training never appear for client viewers, even when switched on.
- **The area is an add-on your organization does not have.** Resources only appears when the organization has the Resource Library. Report a Hazard only appears when the organization's plan includes incident recordkeeping. Ask your ShieldSphere contact to switch these on if you need them.

If nothing at all is shared with you, the home screen says **Nothing has been shared with you yet. Contact your safety administrator.**

> **A DISPLAY SETTING, NOT A LOCK**
>
> Turning a tile off hides it from the portal. It does not change who can sign in or what your safety team sees in the main dashboard.

5 Read, acknowledge and sign off

Safety Policies

The list shows each policy with its last-updated date. Open one to read it in full, including any OSHA references. At the bottom, press **Acknowledge**. The page then shows **Acknowledged on** and the date and time, and the list marks the policy **Acknowledged**.

Toolbox Talks

Each talk shows its date, and the date it is scheduled for if there is one. Open it to read the overview, why it matters, discussion points, safety reminders and discussion questions. Press **Sign off** to confirm. The page then shows **Signed on** with the time, and the list marks it **Signed**.

Job Hazard Analyses

Only finalized analyses for your site are listed. Each row shows the number of steps and hazards and the overall risk level. Two download links sit on each row: **Employee handout**, a one-page version for the crew, and **Full report**.

If your job role requires an analysis, the row is tagged **Required for your role**, those rows are listed first, and a button appears: **I have read and understand this**. If the analysis is later changed, the button comes back as **Acknowledge the update** with a note that it changed since you last acknowledged it. Client viewers see the list and downloads but no acknowledge button.

6 Report an incident or a hazard

EMERGENCY FIRST

Both reporting pages begin with the same warning: call 911 first if someone is hurt or in danger. The portal is for recording what happened, not for getting help.

Report an Incident

Use this for a workplace injury, illness or near-miss. Employees only. The safety admin reviews every report before it is added to the OSHA log, so a report is a request for review, not an entry in the official record.

1 Say when and what kind

Pick the **Date of incident** (it cannot be in the future) and answer **What kind of incident?** with Injury, Skin disorder, Respiratory condition, Poisoning, Hearing loss or Other illness.

2 Describe it

Fill in **Describe the injury or illness** (at least 10 characters). Then, if shown, add **Where did it happen?**, **Kind of injury**, **Where on the body?** (tap the body diagram), **What were you doing just before?** and **What happened?**.

3 Submit

Press **Submit report**. You will see **Report submitted** and a **Back to portal** button.

Some sites use a custom form with extra questions of their own, and may rename or hide some of the standard ones. Answer whatever your form shows; required questions are marked.

Report a Hazard

Use this for anything short of an injury. Employees only. Choose what you saw:

CHOICE	USE IT FOR
Unsafe condition	Something here could hurt someone, such as a spill, a missing guard or a blocked exit.
Unsafe act	Someone working in a way that could get them hurt.
Good catch / safe work	Someone did it right. Give them credit.
Idea	A way to make the job safer or easier.

Then describe what you saw, say where it was, and optionally rate the severity (Low, Medium or High) and add up to three photos with **Take or add a photo**. You can send the report anonymously. Anonymous reports do not show up in your own list afterward.

If your site has a separate near-miss form, a line near the top reads **Someone was nearly hurt? Report a near-miss instead**. If reporting is paused for your site, the page says so and asks you to tell your supervisor in person.

Under **My reports** you can follow each report you sent under your name. The status uses plain words:

STATUS SHOWN TO YOU	MEANING
Sent	Received, not yet looked at.
Being looked at	The safety team is reviewing it.
Being fixed	An action has been assigned.
Closed	Finished.
Closed, no action	Reviewed and closed without further action.

For how the safety team handles what you send, see the Safety Observations guide. For how incident reports are reviewed, see the Incidents guide.

7 Look things up

Safety Data Sheets

Search by chemical or manufacturer, then tap a chemical to open its data sheet. A chemical with no sheet uploaded shows **No SDS on file**. See the SDS guide.

Lockout/Tagout Procedures

Lists finalized procedures with the equipment name and location. Open one to view the same PDF the safety team prints.

Inspections

Lists finalized inspections by date, inspector and place. Press the download button on a row for the report. Need a fuller report? Ask your safety admin.

OSHA 300 Log

Shows approved recordable cases with job title, date, place and outcome (Death, Days away from work, Job transfer/restriction, Other recordable case). A privacy case shows as **Privacy case** instead of a name. For the 300A annual summary, contact your safety admin.

Resources

A searchable, read-only list of shared company files. Filter by tag, sort, and click a file to download it. See the Resources guide.

Safety Committee

Shows each committee at your site with its members, their role and who they represent, and finalized meeting minutes you can download as a PDF. Drafts are never shared. See the Safety Committee guide.

My Training

Your training records with their expiry status (for example **Expired**, **Expires today** or **Expires in 12 days**), a **Certificate** button on each, and the sessions you signed in to. This page is for reading; you do not complete training here.

8 For the administrator: invite people and choose what they see

Owners and admins manage portal access. It takes two steps: give each person access, then decide which areas the site shows.

Give an employee access

1 **Make sure the employee is ready**

The person must be on your employee list as an **active** employee with an email address. Without an email, or if the person is inactive, the Portal access section tells you so.

2 Grant access

Open the employee's record and find the **Portal access** section. Its badge reads **Not granted**. Press **Grant access**. ShieldSphere emails a sign-in link and the message reads **Portal access granted. Sign-in link sent.**

3 Check on them later

Once granted, the badge reads **Granted** and the section shows the date granted and the **Last sign-in** (or Never). Press **Resend link** to send a fresh link, or **Revoke** to remove access.

> **AN EMAIL CAN BELONG TO ONE ORGANIZATION**
>
> If the address is already linked to a different organization, access cannot be granted and you are told to contact support.

> **REVOKING TAKES EFFECT ON THE NEXT CLICK**
>
> Revoke cannot end a session that is already open, but the person is turned away on their very next request, and signing in again fails with a message that access has been revoked.

Choose what each site shows

`Site → Settings → Portal Visibility`

Each site has a switch for every portal area, labelled **Show [area] on the portal**. The areas are Safety Policies, Safety Data Sheets, Toolbox Talks, Lockout/Tagout Procedures, Job Hazard Analyses, Report an Incident, Report a Hazard, Inspections, OSHA 300 Log, Resources, My training and Safety Committee. Employee-only areas are marked as such. Save the page to apply your changes. The settings are per site, so two sites in the same organization can show different tiles. See the Profile Settings guide.

Client viewer accounts are set up for you. Ask your ShieldSphere contact if you need to add one.

9 Troubleshooting

WHAT YOU SEE	WHAT TO DO
No email arrives	Check spam. Confirm you typed the exact address your employer has on file. Ask your admin to check you have been granted access, and to press Resend link.
We couldn't find your employee record. Ask your safety admin to add you and grant portal access.	You are not on the employee list yet, or have no portal access. Ask your administrator.
Your portal access has been revoked.	An administrator removed your access. Contact them.
That sign-in link is invalid or has expired.	Links last one hour and work once. Request a new one.
This email is already linked to a different organization.	Contact your safety admin; they will need

	ShieldSphere support.
A tile you expected is missing	See section 4. It is switched off for your site, reserved for employees, or part of an add-on your organization does not have.
Taken to the dashboard instead of the portal	Your account is a full ShieldSphere user, not a portal user. Full users work in the dashboard.