

# I've logged into LearnTrac before – will I use my same login?

No, you'll log in using the email address associated with your Admin123 Producer Portal. LearnTrac had some alternate criteria that we've removed from this new Portal, so the login will be different. Fortunately, it's simple to locate your login username since it's your email address on file!

# How do I login to my OneSource Portal?

<u>Click this link</u> or navigate from <u>our Website's</u> "Producer" drop-down at the top of the page. This will bring you to a login screen. You should have received an email from OneSource when you enrolled with your assigned username and link to create your password.

You can always do a password reset from the login screen mentioned above by selecting "Forgot your Password?" Once you sign in, you will be able to access your Portal.

### Where do I go to access my portal?

<u>Click this link</u> to go to the Producer Portal login screen. Once you login, you will be able to access your Portal.

# I missed the email to create my password, what can I do?

Don't worry, you can still set up your password. If you go to the login screen, you'll see a line of text that reads "Forgot Your Password?" Click this option, input your email address, and select "Send New Password." A reset link will arrive in the inbox associated with this login.

#### How do I update my password?

In the top right corner of your Portal Homepage, you will see your name. When you click your name, a short drop-down will appear with an option to "Update Password."

# How do I update my email?

At this time, you will not be able to change your email within the Portal – however, you can contact Producer Support by calling **(833) 546-4477** or emailing **ProducerSupport@OneShareHealth.com** to make that change.

#### OneShare Health, LLC v.062321

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# What can I access within the OneSource Producer Portal?

Through OneSource, our CRM is integrated directly with your Portal. Member information, and updates are automated and tracked within each Member Profile and accessible in your dashboards.

Within OneSource, you also have automated resources, like a direct link to the First Health<sup>®</sup> Provider Search and a Contact Us Form that feeds directly to Producer Support.

#### Also Accessible Within OneSource:

- **Dashboards** New dashboards outlining your activity, and breakdown of enrollment stats will be easily accessible and automatically update with every new Member you enroll!
- Quick Actions Your Portal home screen will feature a few quick, frequentlyused actions such Enrollment, First Health<sup>®</sup> Provider Search, Quick Quote (no need for the quoting calculator!), and more.
- **Producer Resources** We are dedicated to consolidating materials that may help in your enrollment and Member management process. The Producer Portal will house or link directly to:
  - <u>Marketing Portal</u> Your one-stop-shop for all Compliance-approved Marketing material, Best Practices, and reference documents (logos, brand guidelines, videos, social posts, etc.).
  - The OneShare Knowledge Base A quick search in our Knowledge Base will populate a wealth of answers and information you can provide to prospective Members, or your active Member population. From navigating OneShareBox to filing tax exemption, we've got you and your Members covered.
  - <u>Member Video Hub</u> Want something you can link directly to your active Members? Our Video Hub offers educational, easy-to-digest content on some of our key Resources.
  - The One Share, One Voice Blog Subscribe and access our Blog for timely articles, news, announcements, and health tips! Your Members will want to subscribe, too!

We will continue adding features and functionality post launch and will be sure to keep you informed of any new additions to this intuitive new platform.

# What's the difference between the OneSource Producer Portal and the Member Portal?

The OneSource Producer Portal features several quick action buttons for those frequently used items such as the Quick Quote tool, as well as a collection of resources for enrollment and active Member questions like FAQs, Marketing Portal materials, First Health<sup>®</sup> Provider Search, and more! You also have easy access to training items, your dashboards, and our standard forms.

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#### The Member Portal features a similar layout, but with Member-facing resources such as:

- A digital Member ID and Guidebook for easy reference
- Links to all Discount Services such as Prescription, Vision, Dental, and more
- Direct access to our MAP/Behavioral Health Portal and Telemedicine contact info
- Click-thru options for the Member Resource Hub and OneShareBox
- First Health<sup>®</sup> Provider search button
- Forms, contact info, and more!

# What can my pending Members access in their OneSource Portal?

Pending Members waiting on their Effective Date will have a lite version of the Portal.

The lite version of the OneSource Member Portal provides access to some of their Pre-Effective Date resources such as the First Health<sup>®</sup> Provider search (to help determine Providers prior to their Effective Dates), links to the Knowledge Base and Member Video Hub (to prepare them for our offerings during their Membership), Behavioral Health articles on our curated MAP platform, and more.

As part of their enrollment communications, Members will be sent a video with instructions on how to navigate their new Member Portal as well. Please feel free to direct any of your active Members to this video if they have questions!

# What is the OneShare Health Producer Marketing Portal?

In order to provide our active Producers with up-to-date and pre-approved, compliant marketing materials for their use, the OneShare Health Marketing Team launched the **Marketing Portal**.

OneShare Health updates the Portal on a quarterly basis and continues to add new materials and refine our messaging. From up-to-date brochures and one-sheeters to social media posts and video links, the OneShare Health Producer Marketing Portal has all these downloadable resources and more, right at your fingertips. Some of the printed materials within the site are customizable to include your unique contact information, and all orders, printing, payment, and shipments are managed within the Portal as well.

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#### Here are some of the pre-approved materials you'll find in the Portal:

- Design and Advertising Guidelines
- Logo Files and Fonts
- Leave Behinds, Post Cards, Digital Ads, and Magazine Ads
- Sales Presentations and Brochures
- Articles for Blogs and More
- Social Media Guidelines
- Approved Social Media Graphics
- Video Guidelines
- Approved Marketing Videos

Please note that Marketing-created guides are there to help you optimize these materials so that you may promote OneShare Health enrollment while remaining compliant and within brand guidelines. If you are an active OneShare Health Producer who would like to request access to the OneShare Health Producer Marketing Portal, please visit our **request page**.

If you have any questions or need assistance, please reach out to <u>Marketing@OneShareHealth.com</u>, <u>ProducerSupport@OneShareHealth.com</u> or call (833) 546-4477.

# How do I get access to the OneShare Health Producer Marketing Portal?

Access to the Portal requires the submission of information for approval.

Since the material on this site is sensitive and remains secure, we ask that our Producers fill out the required information <u>on the request page</u>. Once your information is submitted via this form, our Sales Team will confirm your request, and you will receive an invite with your username and password!

If you have any questions or need assistance, please reach out to <u>Marketing@OneShareHealth.com</u>, <u>ProducerSupport@OneShareHealth.com</u> or call (833) 546-4477.

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