



Producer Portal Guide



Welcome to... OSH XPRESS

Let's get started!

This step-by-step guide will walk you through navigating your portal, providing a quote, enrolling a Member, how to view and download reports, contracting and FAQs.

If you have any questions, or need help navigating your portal, please contact **ProducerSupport@OneShareHealth.com** or call **(855) 699-0487**.



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FAQs.....

STEP 1: Portal Access

Access the OSHXpress Producer Portal at: https://producer.onesharehealth.com/

Initial Login:

A separate email will be sent from **no-reply@verify.onesharehealth.com** containing a temporary password and login instructions.

This is l	your portal login screen! –	
	OneShare	
	Sign in Sign in to access OneShare Health OSHXpress Portal	
	Email address	

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STEP 2: Homepage

You have two enrollment options:

- 1). Producer Assisted: Select the New Quote tab at the top, then click "Producer Assist Link."
- **2). Member Self-Enroll:** Share your **Member Self Enroll Link** so clients can complete the enrollment on their own.

NOTE: Once you send your client the Member Self Enroll Link, the client must complete the enrollment process on their own. In order to assist the client, you must start a new Producer Assisted enrollment process.

Click New Quote to begin a quote	OneShare Health Produ Welcome to the OneShare I experience for you. Please Producer Assid Link Me	Health Producer Portal Health Producer Porta send an email to osha ember Self Enroll	w al Preview. We welco press@onesharehe Link: https://uat.e	ome your feedback as we contin alth com with any feedback. nroll onesharehealth.com/home	ue developing the features and ?context=U2FsdGVRX19e6iFbpS	iQêy
	Member	Email	Phone	Type	Enrollment Progress	
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		allows their o	clients to wn enrol	o complete Iment.		3

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STEP 3: Quick Quote

To provide a quote, enter the state, age of the oldest Member, and how many are enrolling.



NOTE: You can change the ISA and Per Incident Sharing Maximum before adding to the quote. It's important to review the different sharing services based on each Tier with the Member, and look up their Providers to see if they are in network with First Health.

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STEP 4: Email Quick Quote

You can add up to three different Programs/Tiers to the quote, so your client can compare. To email the quote, simply enter their name and email address.

+ Back to Program:	Navigate b	ack to choose a	Q	uick Quote		
R	differ	ent Quote	California fa	mily of 2, oldest family member is 46		
	Catastrophic	365 \$150k, 10000	Cata	strophic \$150k, 10000	Classic Basic, 10000	
	\$22	4.49 _{imo}		\$279.36 _{/mo}	\$611.96 _m 。	
	\$224.49 1st month	+ \$25.00 Application fee	S.	279.36 + \$125.00 Ist month Application fee	\$611.96 + \$125.00 tst month Application fee	
Click to Enroll	Enrol	I for \$249.49		Enroll for \$404.36	Enroll for \$736.96	
			This q	uote expires in 30 days.		2
		Save this quote for la	er	Quille CO, 2023)	uote Expires in 30 Days	
		Member name	Men	nber email address		
Send a Quid	k Quote	Member name		Email address		

NOTE: This quote will be saved for 30 days so you can continue if the client decides to enroll. Just go to the reports tab at the top of the screen and then click on **Quotes & Enrollments**.

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STEP 5: Quick Quote Email

If a Quick Quote email was sent to your client, they will receive the following email from **no-reply@verify.onesharehealth.com**, comparing the quotes selected. The client has the option to click "**Enroll Now**" and complete the enrollment themselves. The Quick Quote Email will provide your email address and the ability to download **Program Brochures**.

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Quick	uote!	
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Classic Basic	10000	
Classic Basic,	, 10000	
Your Monthly Paymen	it: \$611.96	
Program Details		
Individual Sharing Amount (ISA)	\$10,000	
Per Incident Sharing Maximum	\$150,000	
Lifetime Sharing Maximum	\$1,000,000	
Family Size	2	
Oldest Member Age	46	
State	CA	
Enrollment Cost Breakdown		
Industry Fra	F136	
Total First Month Damas	\$120 \$776.00	
rous First Month Payment	\$736.96	
Recurring Monthly Payment (Months 2+)	3011.20	
onesharehealth.com, 1125 Executive Circle, Buile 130	, inving, Texas 75038, 682-651-7400	
Emali		
(S) J. Download brochures		

Once your client chooses the best Program/Tier to meet their healthcare needs, select the Program and click the **Enroll Now** button to proceed.

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STEP 6: Review and Enroll

Now it's time to review pricing. The pricing will be split between the monthly cost and the one-time application fee.

NOTE: Any additional fees, if applicable, will be included in the total monthly cost. Next, click **Continue** to start the application, or edit the quote if needed.

	Classic Basic, 10000		New Enrolln	nent	Status	
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		T I	Enrollment Progress	s Bar		0
	Summary		Line interesting test			
Monthly C	Cost + Application Fee	Monthly C	ost	Application Fee		
	Dicardown	\$641	96 +	\$65.00		
	1	<i>w</i>ut		\$00.00	J	
		\$706.96	\$641.96/mo	Continue →		
		1st month	thereafter	R	Click Continue to	
			VOTE: There is a \$45 annual adr	ninistration fee	Proceed with	
					Enrollment	

NOTE: Editing a Quote

If the client would like for you to add a dependent to the Quote, or change the Program type, you're able to simply edit the quote and refine it to their specifications.

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STEP 7: Qualifications

The qualifications page is where you will read out loud the Statement of Beliefs and attestations to your client. If the Member agrees, click on the box, and this will allow you to move on to the next step of the enrollment. If they do not agree, this will stop the client from enrolling. The client will need to agree to our Statement of Beliefs and attest to no tobacco use, alcohol abuse or substance abuse in the past 12 months.



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STEP 8: Family Demographics

Now it's time to enter their personal information, demographics, and dependents, if applicable. Please double-check the email address!

Home New Quote	Reports Onboarding Links Re	sources Contact		New Enro	llment			Status	
\$6	641.96 _{/mo}	(California	family of 2, oldes	t family men	nber is 46		SAVED	
View	program features	0	•		4	5	6		
	Edit this quote	Summary Qu	JainCations	Family	Start Date	Payment	E-Sign		
	Primary Membe	er							
	First name	Last name		Gender	Date of birth	Phone n	umber		
	First name	Last name		Male Female		S Ph	ione number		
Fill out the	Street address	I have an unlisted address	Email addre	255	Confirm Ema	il address			
Enrollment	Street address		🗃 Ema	il address	🖨 Emaila	address			
Application	1								
	Dependents								
	Member name	10	Male F	emale Relationship	c Date o	of birth			
				Save & contin	nue →				

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STEP 9: Start Date

On this page, you will choose the Membership Active Date and the Monthly Contribution billing date.

NOTE: Memberships cannot become active on the 29th, 30th, or 31st of the month.

	Classic Basic, 10000 \$641.96/mo Mew program features	Californ	New Enrollme	y member is 46	6	Status SAVED	
	Active Date						
		Membership active date	Date of 1st contribution	Day of the month for contributions	ongoing		
		06/13/2025	06/13/2025	1	0		
D	Choose Membership A ate, Date of 1 st Contrib and Ongoing Draft D	ctive	Schedule 06/13/2025- Initial payment of \$ (For membership month: 06/13/2025- 06/13/2025 - Monthly payment (For membership month: 0/1/13/2025- Save & continue ->	706.96 07/12/2025) i of \$641.96 08/12/2025)	Click Sauce		

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STEP 10: Payment

Next, you will enter the method of payment. We accept bank drafts, debit cards, and credit cards. Once you have read the disclosures to the client, click the authorization box and continue.

	Classic Basic, 10000	Nev	w Enrollment		Status
	\$641.96 Imo View program features - Edit this quote	California family	y of 2, oldest family member	is 46 () E sign	SAVED
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)		First name	Last name	Enter Payment	E .
		Street address I have an unlister 0 10 Paramount Cir, Sacramento	a cA9	Information	
	Read the following d	isclosure to the member:			
Poord Diselecture	You authorize transaction, wi You also give monthly centri You also confi erroitment.	OneShare Health, LLC to draft the pr hich includes your first monthly contril authorization to automatically draft yo butions, fees and the \$45 annual adm m that you are the owner of or author	ovided checking account or charge bution and fee and a one-time appl rur checking account or charge you inistration fee due on your program rized to use the account or credit ci	the provided credit card for this initia ication fee. r card each month for all subsequent n year anniversary date. ard you provided in your application fo	e Sr
Client and Check	k the	d that OneShare may change monthl	ly contribution amounts at any time	and will notify you of any such chang	pe.
Box if they Age	Tee I have read the abov	e payment disclosure to the member	Save & continue →	Click Save & Procced to th	Continue to le Next Step

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STEP 11: Member Signature

Now that the application is complete, it's time for the client to sign! You can send the Member Agreement to them via text or email.

NOTE: Voice verification is only required if you've been directed by our Compliance Team.

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	E-sign	O Enrollment Expiration: Res	nind the enrollee to sign before 06/13/25 Voice Verification		
			Conference cal) with	
	Text or Email Member Agreement ~	Send via sms Send via em eri application to mobile divice Email applicatio signer's ema	aali 682.244.441 n to OneShare's recc i required for enror representatives wh been directed to ur the OneShare	65 ostat Insent o have e 8 By e	
		Co	Complance les	Click Continue after he Client Signs their 4ember Agreement	

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STEP 12: Texting Option

If the text option is chosen, enter the client's phone number and click send.

NOTE: They MUST sign before the first contribution date, or the enrollment will expire.



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STEP 12: Texting Option (Continued)

When the client receives the text to sign the Member Agreement, they do <u>NOT</u> have to download an app.





All the Member must do is click "Sign With Mobile Browser" at the bottom of the screen to proceed. On the Member Agreement, they will initial where instructed and sign at the bottom.

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STEP 13: Email Signature Option

If the email option is chosen, enter the client's email address and click send.

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	Email Option: Enter in the Client Email	Continue + a	197 197	

NOTE: They MUST sign before the first contribution date, or the enrollment will expire.

Your client will receive the Member Agreement via email, which looks like this.



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STEP 13: Email Signature Option (Continued)

The client must initial the required sections and sign the Member Agreement.

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Member Agreement Outshare is Not Insurance Outshare is Not Insurance Outshare is not insurance company, and the Program it administers are not insurance. JS Institution by initialing here, you acknowledge that you understand and agree that OutShare is not insurance. No Promise to Per Noder Confliction of any Member's Medical Excesses; or assume any risk	Member Agreement Onlikar's NM Insurance Constant's NM Insurance Onlikar's NM Insurance Onlikar's NM Insurance Image: State of the	Client Signs the			Disclaimers				
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			No Promise to Pay Neither OneShare nor its Memb	sers promise or guarant	ee payment or sharing o	of any Member's Me	dical Expenses, or assume any risk	•	~~~

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STEP 13: Email Signature Option (Continued)

After the Member Agreement is signed, your client will receive an email prompting them to download their signed Member Agreement.

TEST Member Agreement - New Enrollment Test Has Been Completed SignNow <noreply@signnow.com> on behalf of signNow <mail@signnow.com> Teston As Depad Entertain Anging 'yau Phidg' (prient) ① If there are protonse with how the message is displayed, dick here to river if in a web browser.</mail@signnow.com></noreply@signnow.com>	Equire: 5/3/2012	(i) ←> Reply (ii) Formut (iii) Weid 5/17/2023 1:
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STEP 14: Congratulations! New Member Pending Enrollment

Keep in mind, although the Producer has completed their portion, the enrollment is NOT official until the Member has signed and first contribution has been drafted.

NOTE: Once the Member signs, their enrollment status will show pending, and an email will be sent to both the Member and the Producer. The Member status will not show Active until the day of their Active Date and first payment has been received.



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STEP 15: Your New Member Receives a Welcome Email from OneShare Health.

We can be letter together We can be letter together Out Dear Valued Member; We come to ConsStreme Health As part of our initiative to provide an unparalleled Member experience, we are here to answer any questions you may have about, und membership with our Health Care Sharing Ministry. Be on the bocked for an enail from our Member Portal System with your logit Immore ID: ERROR Check out some of these commonly asked questions. If you'd like more inframtion, and fremes Support Team at any time. Well get you laken care of Well get you laken care of the start care soft More Dees ComeShare Health Nor mem about ConeShare Health, our comprehensive Program, how sharing wocks and memole	Creatives Health's Community of Members	
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Member ID: ERROR Cick Here To View Your Member Portal Chack out some of these commonly asked questions. If you'd like more information, feel free to reach out to our Member Support Team at any time. Weitig up you taken care off How Does OneShare Health Work? As a Health Care Sharing Ministry, our family supports and cares for all of our Members. Watch these videos to learn more about OneShare Health, our comprehensive Programs, how sharing works, and more!	Be on the lookout for an email from our Member Portal System with your login information and temporary password.	
Click Here To View Your Member Potal Chock out some of these commonly sixed questions. If you'd like more information, field free to reach out to our Member Support Toam at any time. We'll get you taken care of! How Does OneShare Health Work? As a Health Care Sharing Ministry, our family supports and cares for all of our Members. Watch these videos to learn more about OneShare Health, our comprehensive Programs, how sharing works, and more!	Member ID: ERROR	
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OneShare Health Work? As a Health Care Sharing Ministry, our family supports and cares for all of our Members. Which these videos to learn more about OneShare Health, our comprehensive Programs, how sharing works, and more! Visit the Video Library	How Does	
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As a Health Care Sharing Ministry, our family supports and cares for all of our Members. Watch these videos to learn more about OneShare Health, our comprehensive Programs, how sharing works, and more!	Work?	
to learn more about OneShare Health, our comprehensive Programs, how sharing works, and more!	As a Health Care Sharing Ministry, our family supports and cares for all of our Members. Watch these videos	
	to learn more about OneShare Health, our comprehensive Programs, how sharing works, and more!	



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STEP 1: Click on Reports

From your Producer Dashboard, simply click on the Reports tab at the top of the screen.

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	hn Smith	kah, joský geniladies com	QUOTE exp: 29 days	0% Not Stanted S

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STEP 2: Report Page View

Once you click on **Reports**, you will see several reports you're able to easily access.



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STEP 3: Definition of Reports

Once you click on **Reports**, you will see several options you can select which feature different types of reports you're able to easily view.

Quotes & Enrollments - Click here to view a quote you've started and check its status in the enrollment process. You can also begin a new quote or export a CSV file containing prospective client information.

Downlines - The downline report provides details about Producers in your downline, including their Producer ID, email, contract level, contact information, and contract status. This information can be exported as a CSV file.

Commissions - The Commission Report provides detailed information about your commission payments. You can view commission payments by Member, check the status of each payment, and see the payment date. This information can be exported as a CSV file.

Member - The Member Report displays all Members you have enrolled. Each Member's name is a hyperlink that leads to their detailed information, including demographic data, dependents, Member ID number, and the option to download an electronic ID card. You can also access the Member's payment history, active date, inactive date, and export a list of your Member's into a CSV file.

Member Payments - The Member Payments report will display the Members payment method, payment amount, and transaction date. This information can be exported as a CSV file.

Member Decline Payments - The Member Decline Payments report will show you which Member payments have declined. This information can be exported as a CSV file.

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This section will walk you through Contracting with OneShare Health. If you have any questions, please send a message to **Contracting@OneShareHealth.com**.



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STEP 1: Producer Onboarding

Click on the "Onboarding Links" tab within your Producer Portal. Links are created by commission level. Select the proper link based on which commission level you would like the Producer to be contracted at.



NOTE: If you do not have an onboarding link available, please contact ProducerSupport@OneShareHealth.com to begin onboarding.

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STEP 2: There are two ways a link can be sent to a Producer.

- 1). Copy and paste the link into an email
 - or
- 2). Click on the link and enter the Producer's email address and click continue.

Note: If the onboarding link is copied and pasted into a separate email, the system won't track the status until the Producer enters their information.

OneShare Health Producer Onboarding	9
	You're invited to onboard with OneShare Health. Enter your email address to get started. Enter your email address Continue →

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STEP 3: A message will be sent, prompting for an email address to be submitted to get started.

(S) One Share		Support: (855) 699-0487
OneShare Health Producer On	nboarding	
Your commission rate: 28%	You're invited to onboard with OneShare Health. Enter your email address to get started. Email Address bzitzow+producer-5-18-2@onesharehealth.com	
	Please confirm your email address to get started. We've sent you an email with a confirmation link. Click the link in your confirmation email to continue onboarding.	

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STEP 4: The Producer will receive a "Confirmation Email" asking them to confirm their email.

OneShare Health: Email Confirmation	:	5	*	1
OSHXpress <no-reply@verify.onesharehealth.com> To: uat+producer-onboard@onesharehealth.com</no-reply@verify.onesharehealth.com>	Тс	oday a	t 3:44	PM
(i) Retention: 7 year Policy Expires: 05/14/2032.				
Thank you for your interest in becoming contracted with OneShare Health	ı.			
Please take a second to make sure we've got your email right.				
Confirm Your Email				
Thank you, OneShare Health Contracting Team				

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STEP 5: Once the Producer clicks on "Confirm Your Email", an OSHXpress form will appear. The Producer will need to fill it out and click on "Continue".

				Subbour: (022) 033-0-
OneShare Health Producer (Onboarding		√ bzitzow+pro	oducer-5-16-2@onesharehealth.com
Your commission rate:	First name	Middle name	Last name	
28%	Enter first name	Enter middle name	Enter last name	
	Business / Contract n	ame		
	Enter business nam	0		
	Street address		I have an unlisted address	
	Enter street add	ress		
	Phone number	Tax ID Type	Tax ID or SSN	
	(123) 456-7890	SSN 🗌 EIN	123-45-6789	
			Continue →	

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STEP 6: The Producer will be re-directed to SignNow where they will review and sign their OneShare Health Contract.

Start		
	Background Attestation	
	The following questions must be answered, and the attestation signed, to continue the contracting process with OneShare Health. Answering YES to a question does not automatically preclude your acceptance as a OneShare Health partner.	
	 If you have/had an insurance license, has your license ever been suspended or revoked in any jurisdiction? 	
	YES I have never held an insurance license	
	2. Have you ever been convicted of a felony?	
	Oyes Ono	
	3. Have you ever been convicted of a misdemeanor involving money or property? Examples include, but are not limited to, fraud, obtaining property by false pretenses,	

- If the website times out, you should be able to refresh your browser tab, and it will load back up.
- If you exit SignNow before submitting your contract, you'll need to start over. Return to the confirmation email, click "Confirm Your Email," verify your information, and click "Continue" to reopen your contract.

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STEP 7: Once the Producer is done signing, they will click on "Finish" and their contract will be submitted to OneShare Health.

	You've completed all required fields. There are 7 optional fields remaining in the Finish document. Review them and click Finish.
	OneShare Health, LLC is not an insurance company but a religious health care sharing ministry. For our full disclosures,
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STEP 8: After their Contract has been submitted , they will be redirected back to OSHXpress and will see the the page below. The Producer will receive an email with their Producer Portal Credentials so they can log in and do their training.



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STEP 9: Below is the email that the Producer will receive. The Producer will need to click on the Producer Portal link provided within the email.

Welcon	ne to OSHXpress, Your Producer Portal	\odot \leftarrow \leftarrow \rightarrow
0	OSHXpress <no-reply@verify.onesharehealth.com> To: uat+producer-onboard@onesharehealth.com</no-reply@verify.onesharehealth.com>	Today at 3:48 PM
() Rete	ention: 7 year Policy Expires: 05/14/2032.	
Hi BC	B,	
Welco	ome to OSHXpress, your producer portal.	
Your i	nitial password is:	
8Yd8	7k8&lSPp	
You c	an change your password after logging in with the link below.	
https	://uat.producer.onesharehealth.com	

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STEP 10: The Producer will be prompted to enter their email address.



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STEP 11: Next, the Producer will be prompted to enter their password. The Producer will need to type out the temporary Password provided to them within the training email.

NOTE: If you copy and paste the temporary password, make sure you don't have an extra space.

\rightarrow	G	15	oshexpress.ciamlogin.com/b95ec8ea-429a-49dc-9899-c1c09602310b/oauth2/v2.0/authorize?response_type=code&client_id=8038968 💿 🛧 腹 💌 🗿	8
			\odot	
			<- bzilzow+producer-5-16-2@onesharehealth.com	
			Enter password	
			Formet nassescent?	
			1 Sulfar Benerican	
			Sign In	

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STEP 12: The Producer will be prompted to make a new password and click, "Sign In."

4		9		- standards		100- 40 ·				-			
÷	>	G	t; oshexpres	s.ciamlogin.co	m/b95ec8ea-4	129a-49dc	-9899-c1c09602310b/login	®o 1	X		• ₽	0	
							٢						
							bzitzow+producer-5-16-2@onesharehealth.com						
							Update your password						
							You need to update your password because this is						
							the first time you are signing in, or because your password has expired.						
							Sign in						

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STEP 13: Once logged in, the Producer will see "Step 2-OneShare Health Producer Training." They will click, "Start Training Now" to access.



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STEP 14: There are 6 self-paced training modules which can be completed in less than an hour. Training progress can be saved and resumed.

NOTE: There are Knowledge Checks built in throughout the training modules and Producers must score 100% on each.



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STEP 15: After the Producer has completed their training, their screen will say "Step 3-Final Review Underway." This means the OneShare Health Contracting Department is reviewing their Contract.

Health Producer Onboarding		Sign Contract	Complete Training	OSH Review
	Step 3 - Final Review Underway			
	Congratulations on completing your training! You're one step away from enrolling Members. We're currently			
	conducting a final review of your account. You'll receive a notification as soon as your account is active.			
	Producer Support: (855) 699-0487			
	procession and because and an annual sector			

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STEP 16: When the Producer is approved and made active, they will receive a Producer Welcome Email and have full access to their Producer Portal.



NOTE: If for some reason the Producer did not get approved, they will be notified via email.

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BETTER TOGETHER | 41

Welcome to OneShare Health

Question 1: Why is OneShare Health switching enrollment platforms?

Answer: OneShare Health has launched its own enrollment platform—OSHXpress! Designed with your feedback in mind, OSHXpress is user-friendly and packed with helpful features, including a Quick Quote process, 5-minute enrollment with text-to-sign capability, easy access to reports, and much more!

Question 2: Is there any part of the enrollment process that is changing?

Answer: Yes, the Member will no longer have to log into their portal to sign their enrollment application. The Member Agreement can be signed via email or text.

Question 3: Will all my Members and previous commissions migrate over? *Answer:* Yes, all Members and commission history will be migrated into your producer portal within OSHXpress.

Question 4: Who do I contact if I need help navigating the system? *Answer: Please contact Producer Support at (855) 699-0487.*

Question 5: Will my Producer Portal link still be the same? Answer: No, the new Producer Portal link is <u>https://producer.onesharehealth.com/</u>

Question 6: Will my login credentials change?

Answer: Yes, you will receive an email from <u>no-reply@verify.onesharehealth.com</u> with your credentials. Your username will remain the same, however you will be prompted to create a new password.

Question 7: Is the Member Portal changing too or just the Producer Portal? *Answer:* Yes, the new Member Portal login link is <u>https://member.onesharehealth.com/</u>

Question 8: Can I email quotes from my portal, and do they expire?

Answer: Yes, click on start a new quote, select up to 3 quotes to compare, enter in the prospects name, email address, and click on "Email this Quote". The quote will be sent directly to the prospect with your name, email, self-enrollment link, and brochures. The quote expires in 30 days.

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Question 9: Can I share my enrollment link with prospects to enroll themselves?

Answer: Yes, on the home page you will see "Member Self-Enroll Link", you can copy and paste this link into an email and send it to your prospect to enroll themselves.

Question 10: If a prospect starts their enrollment application using the Member Self-Enroll path, can I pick up the enrollment under my producer assisted link?

Answer: No, the Prospect will have to finish the enrollment on their end or you can start a brand new enrollment under your producer assisted enrollment link.

Question 11: If I start the quote using my producer assisted link, can I pass off the enrollment to the Member to complete?

Answer: No, you cannot pass the enrollment off for the Member to finish.

Question 12: Can I track the status of enrollments in progress?

Answer: Yes, on the home page of OSHXpress, you will see a list of prospects you have quoted and began to enroll. There is a column named "Enrollment Progress". Here you will see a progress bar of where the prospect is at in the enrollment process. Once the prospect is enrolled as a Member, they will fall off the home page and be added to the "All Members" Report.

Question 13: What are the signature options for signing the Member Agreement? *Answer:* The Member can sign their Member Agreement via Text or Email.

Question 14: Does the Member need to download the SignNow app to sign the Member Agreement via text?

Answer: No, the Member does NOT need to download the SignNow app. They can sign the Member Agreement directly from their mobile device by selecting "Sign with Mobile Browser".

Question 15: How long does the Member have to sign the Member Agreement?

Answer: The Member must sign their Member Agreement no later than the day before their first draft date of their initial payment.

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Question 16: Can the Member choose what day of the month they pay the Monthly Contributions?

Answer: Yes, but be aware, depending on their Active Date, they could get double billed in the same month.

• For Example, if a Member chooses the 1st of the month active date and the 15th of the month recurring, they will be billed both the 1st and the 15th of the first month.

Question 17: What reports will be available within OSHXpress?

- Answer:
 - Quotes & Enrollments: Run quotes, search saved quotes and enroll Members.
- **Downlines:** Provides details about Producers in your downline, including their Producer ID, email, contract level, contact information, and contract status.
- Members: View your Member's program, contact information, and their status.
- Member Payments: View your Member's monthly payment amounts
- Declined Member Payments: Track your Member's declined payments
- Commissions: View, sort, and export your commission payments

Question 18: Will I be able to filter and export reports?

Answer: Yes, all reports have filter and export capabilities.

Question 19: Will I be able to access my Members and their information once they are enrolled?

Answer: Yes, under the "All Members" report you have access to view your Members. Click on the Member name to view their demographic information, program type, payment history, and download a copy of their electronic ID card.

Question 20: Will a declined payment fall off the "Declined Member Payments" report after a successful payment has been processed?

Answer: No, declined payments do not fall off the "Declined Payment" report, you must look at the "Member Payments" report to see if a successful payment went through after the declined payment date.

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Question 21: Will I still have access to OneShare Health marketing materials? *Answer:* Yes, you can find the Producer Marketing Kit under the "Resources" tab in your producer portal.

Question 22: Is the Commission Schedule Changing? *Answer:* No, the Commission Schedule is not changing.

Question 23: I received a Member enrollment confirmation for a Member I enrolled in the past, what does this mean?

Answer: This means a Member of yours who cancelled, was re-enrolled by a OneShare Health Internal Enroller. You are being notified because you are still considered the Producer of Record and will receive commission.

OSHXpress Onboarding+ Contracting

Question 24: How will I receive my new contract link?

Answer: You will receive an email with a link from <u>contracting@onesharehealth.com</u> or from your upline agency.

Question 25: Will I be able to add downlines directly?

Answer: Yes, if you have been approved to onboard Producers in your downline, you will see the tab named "Onboarding Links" at the top of your producer portal. Here you will find onboarding links by commission level. You can copy and paste the link into an email or click on the link and enter the producer's email address that you wish to get contracted. If you enter the producer's email address, the producer will receive an email to confirm their email address and proceed with completing their onboarding documents.

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Question 26: Who should I contact if I do not see onboarding links in my Producer Portal? *Answer:* You should only see onboarding links in your producer portal if you are approved to onboard downlines. If you are and you do not see any onboarding links, please contact Producer Support at 855-699-0487.

Question 27: What does the new onboarding process look like in OSHXpress? *Answer:* There are 3 steps to the onboarding process.

Step 1: Fill out and submit Contract- Once a Producer receives their onboarding link, they'll complete a form with their information to pre-populate their contract and required documents based on their commission level. OSHXpress will then redirect them to Sign-Now to sign and submit their contract.

Step 2: Training- Once their Contract is submitted, they will receive an email from <u>no-reply@verify.onesharehealth.com</u> with the Producer Portal credentials to start and complete their training.

Step 3: Final Review and Approval Process- After their training is complete, the Contracting Department will conduct a background check and final review. Once approved and activated, the Producer will receive a welcome email and gain access to their reports and enrollment links.

Question 28: Can I see the contracting progress of my downline producers in the Producer Portal?

Answer: Yes, you can see what stage the Producer is in during the contracting process, their status, and commission level.

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Question 29: What are the Contracting Stages?

Answer: The stages are Contract Pending, Training, Compliance, Final Review, Closed-Won or Closed-Lost.

- Contract Pending: Contract has been started but not yet submitted
- Training: Producer is in Training
- Compliance: Contracting is reviewing background
- Final Review: Contracting is doing a final review
- Closed-Won: Producer has been approved
- **Closed-Lost:** Producer either failed in their background, did not finish their contract, did not finish their training, or other circumstances.

Question 30: If a Producer leaves in the middle of completing their onboarding documents, can they pick up where they left off?

Answer: No, the Producer will need to go back to the email that asked them to confirm their email address and click on the link to start the onboarding documents again.

Question 31: How long does the onboarding process take, and when will I become active? *Answer: The onboarding process is self-paced. Producers may become active within 24-48 hours based*

Answer: The onboarding process is self-paced. Producers may become active within 24-48 hours based on when they finish, all steps included, within the onboarding process.

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OneShare Health is committed to providing Members the most comprehensive, affordable, and flexible Membership to best fit their needs.

Made with 🧡 in Texas

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