



OSH⁺ XPRESS

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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How to Enroll a Member



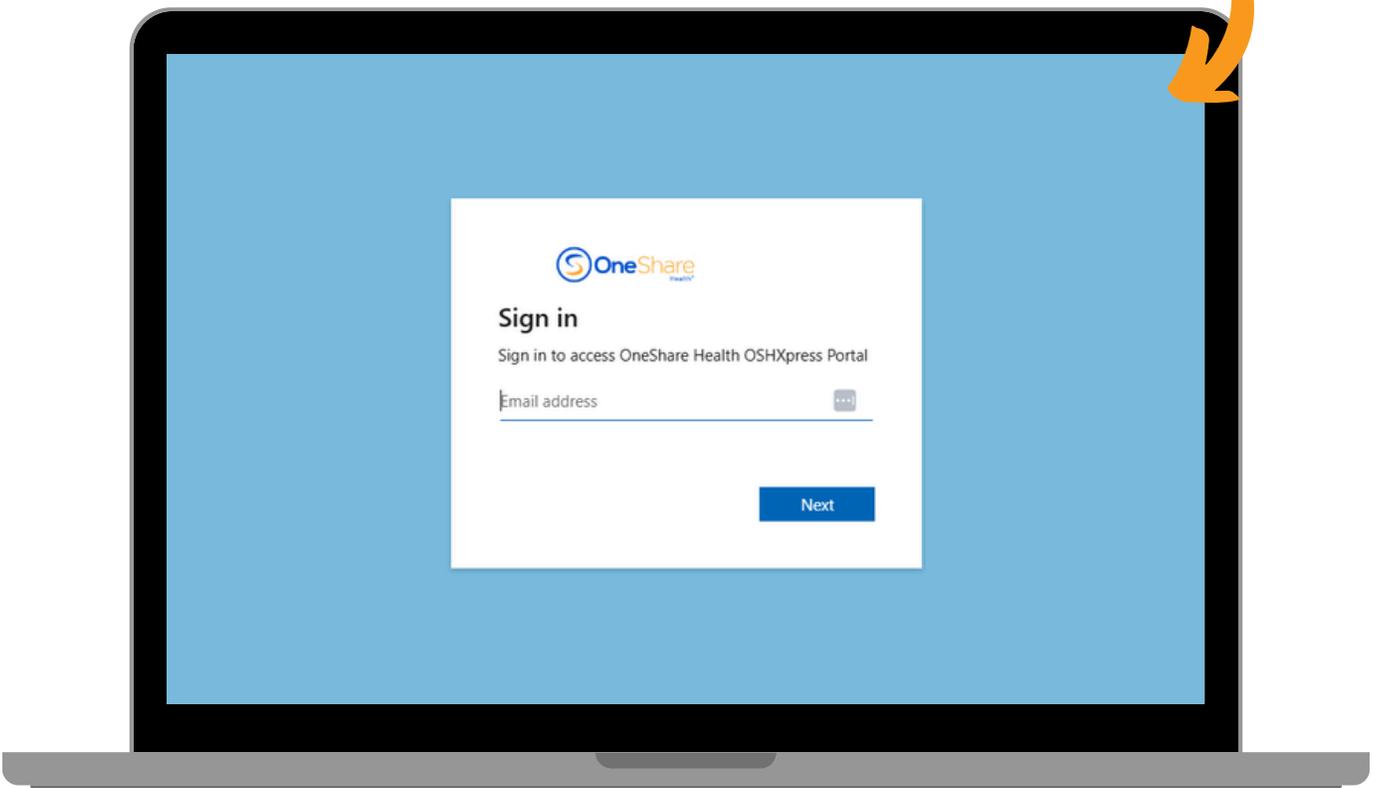
STEP 1: Portal Access

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 your portal login screen!



How to Enroll a Member

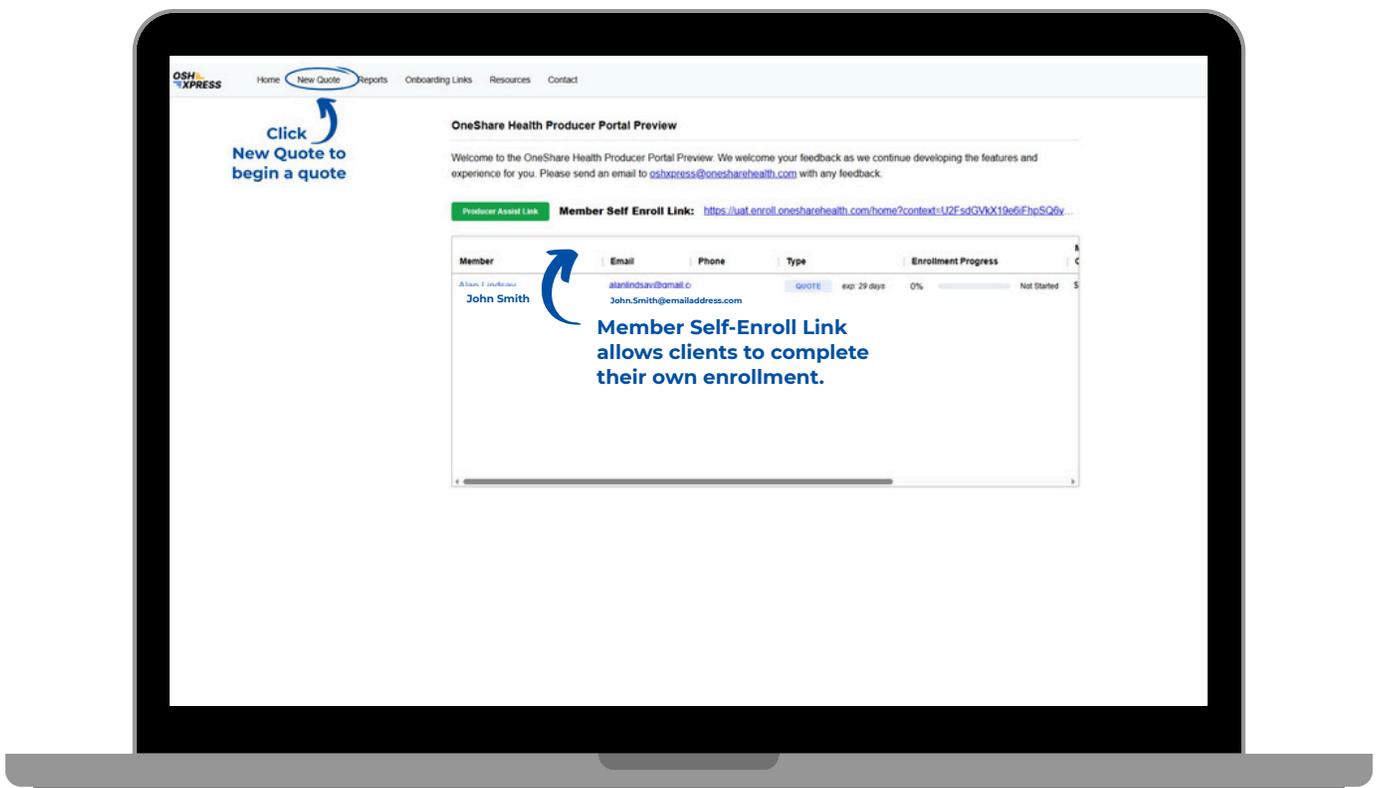


STEP 2: Homepage

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.

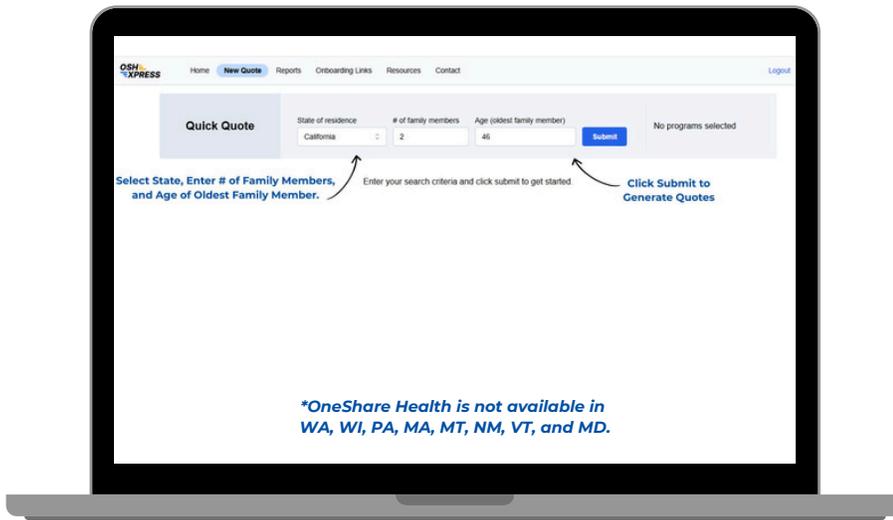


How to Enroll a Member



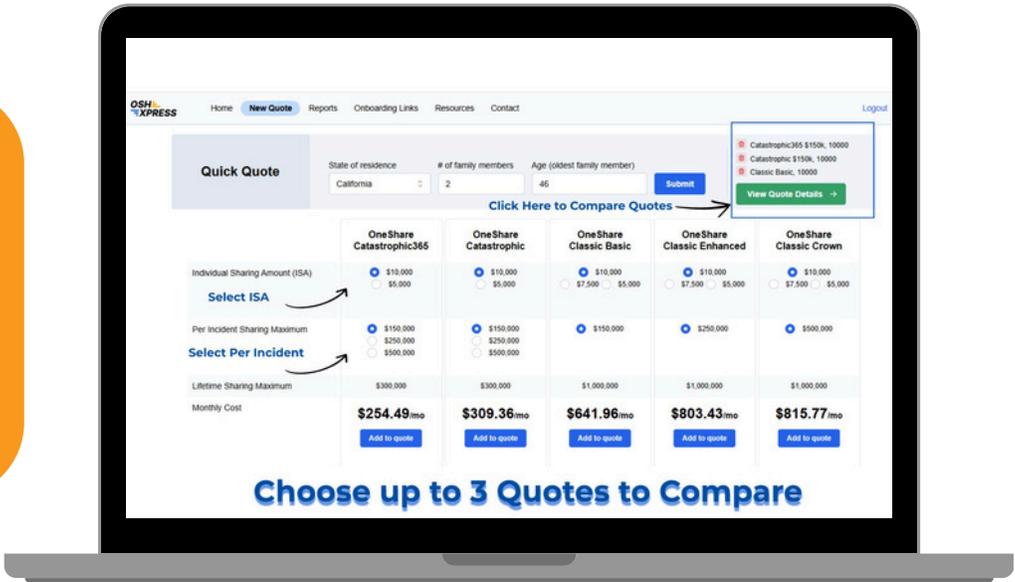
STEP 3: Quick Quote

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



Then all the Programs with pricing will appear!

Please confirm that your name is at the top right corner of the screen to ensure you are listed as the Producer of Record on the enrollment.



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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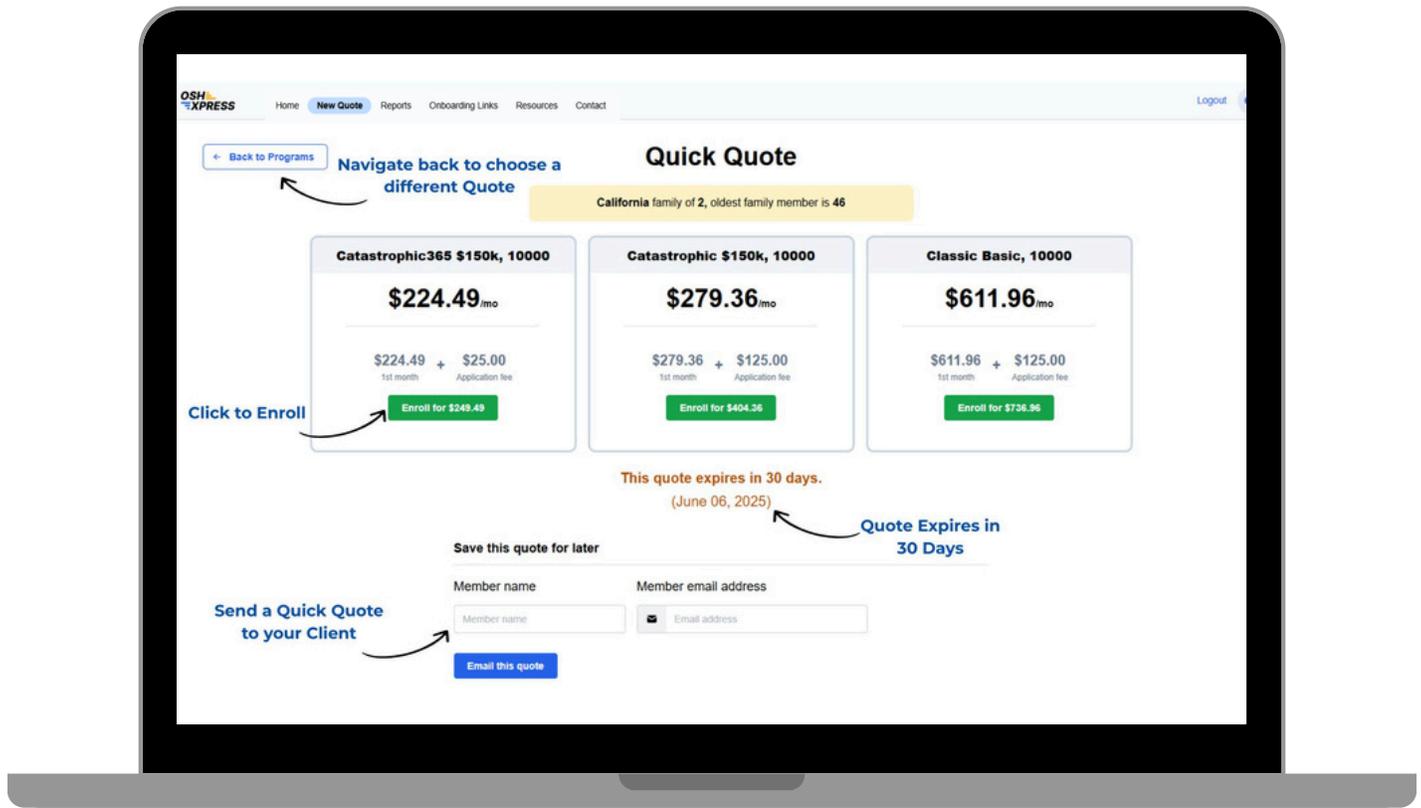
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How to Enroll a Member



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.



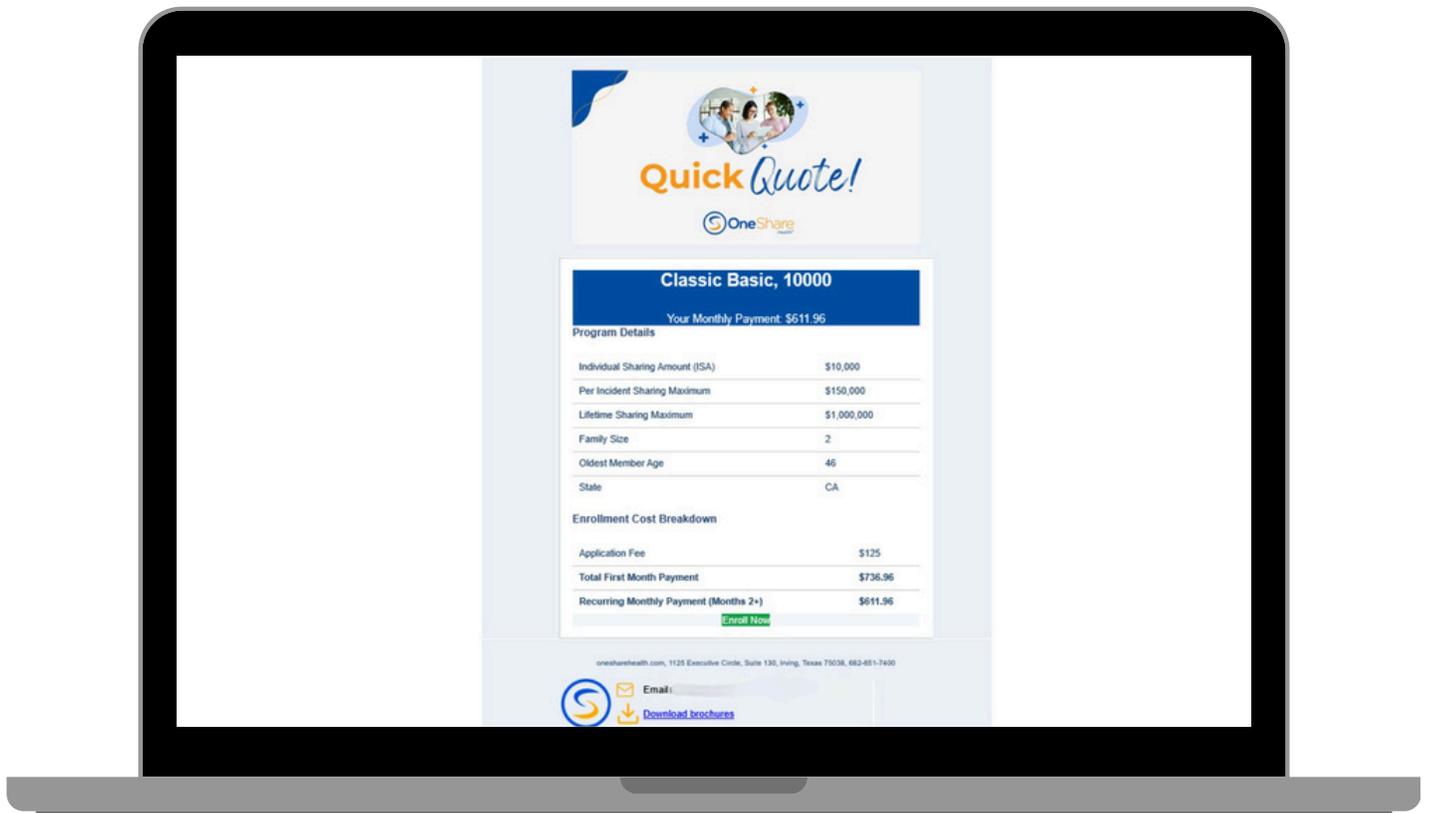
NOTE: This quote will be saved for 30 days so you can continue if the client decides to enroll. Just go to the reports tab at the top of the screen and then click on **Quotes & Enrollments**.

How to Enroll a Member



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](#).



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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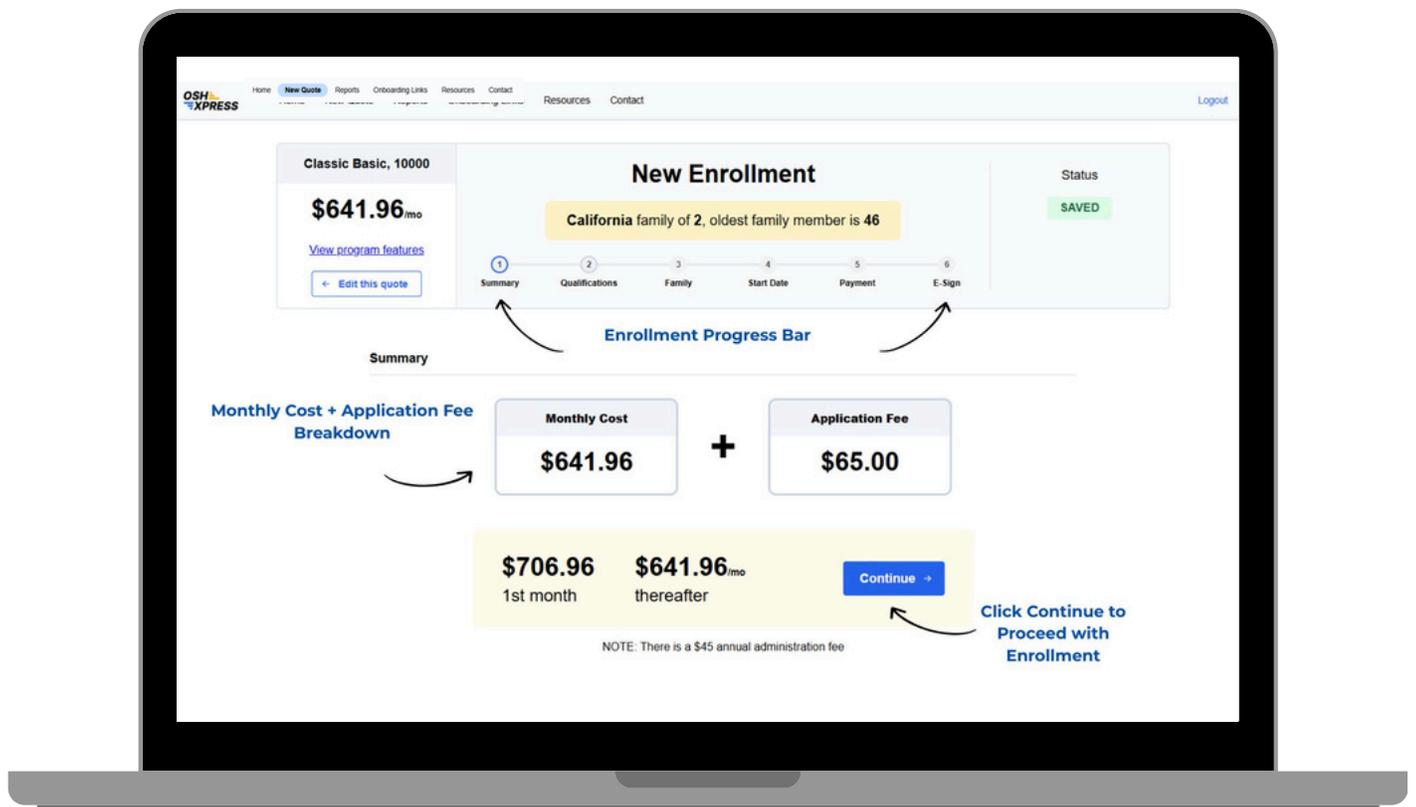
How to Enroll a Member



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.



NOTE: Editing a Quote

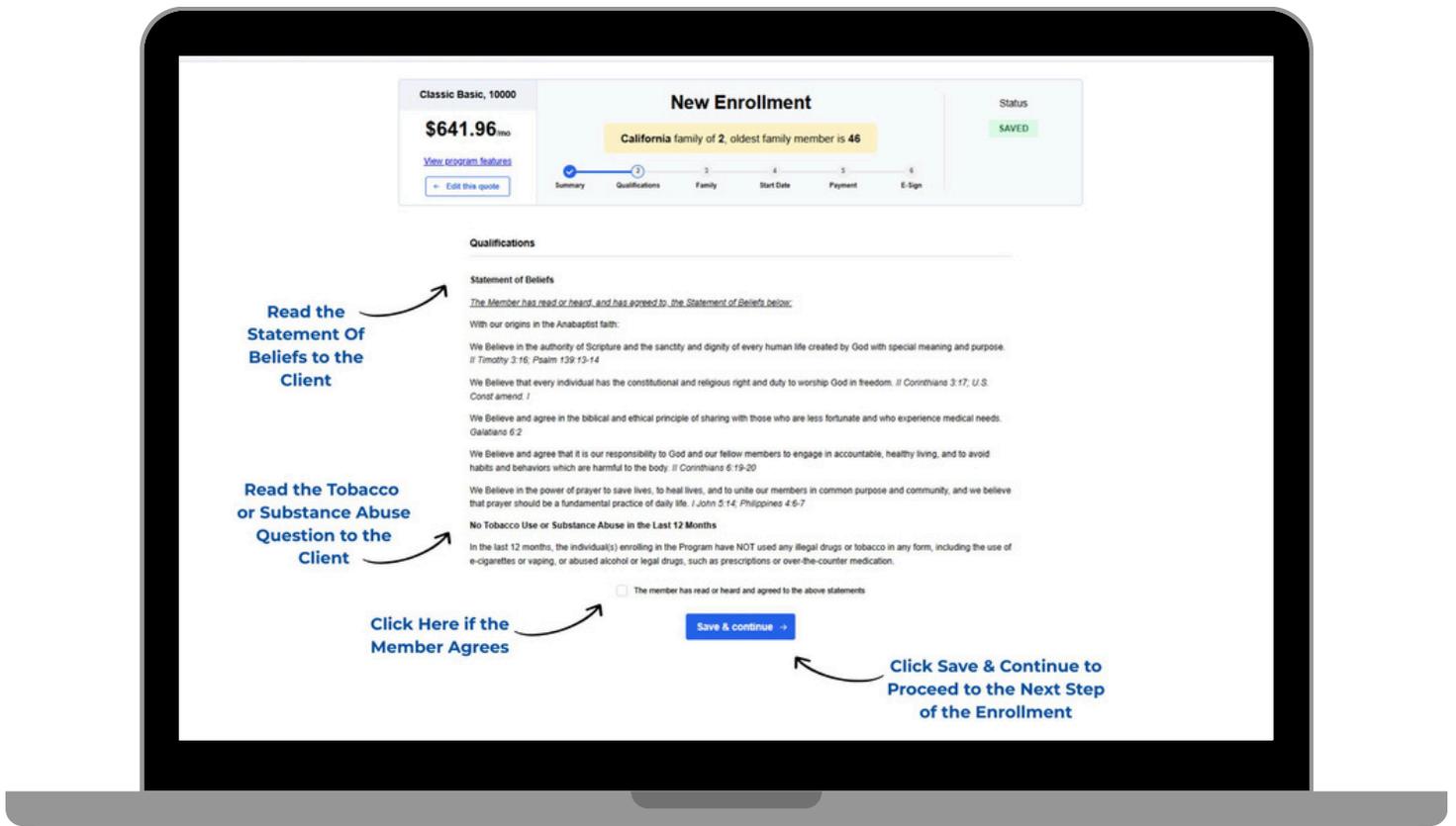
If the client would like for you to add a dependent to the Quote, or change the Program type, you're able to simply edit the quote and refine it to their specifications.

How to Enroll a Member



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.



How to Enroll a Member



STEP 8: Family Demographics

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

The screenshot shows the 'New Enrollment' page on the OSH Xpress portal. The page displays a quote of \$641.96/mo for a California family of 2, with the oldest family member being 46. The enrollment progress bar shows that the 'Family' step is currently active. The form includes fields for the Primary Member's first and last name, gender (Male/Female), date of birth, and phone number. It also has fields for the street address, email address, and a confirmation of the email address. Below this, there is a section for Dependents with fields for member name, gender, relationship, and date of birth. A 'Save & continue' button is located at the bottom of the form. Annotations with arrows point to the 'Fill out the Enrollment Application' text on the left and the 'Save & continue' button on the right.

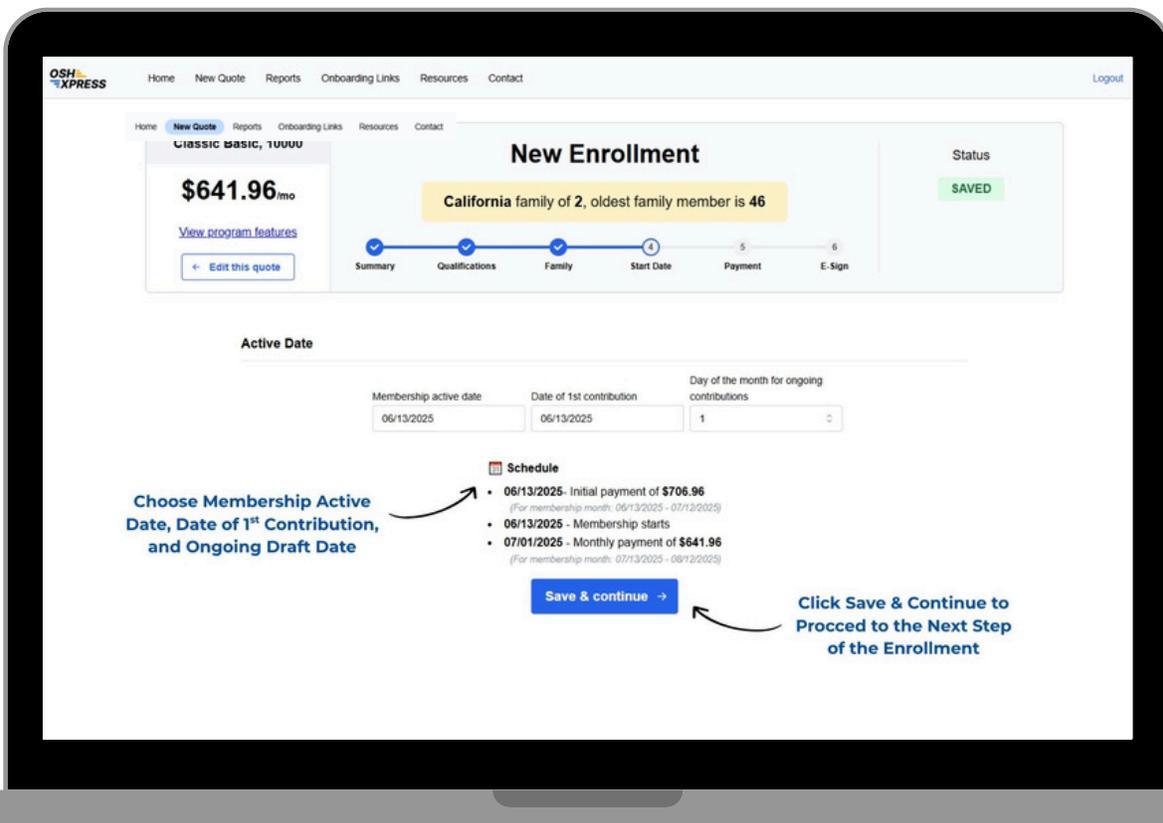
How to Enroll a Member



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.



How to Enroll a Member



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.

The screenshot shows the 'New Enrollment' page for a 'Classic Basic, 10000' plan. The premium is \$641.96. The enrollment is for a 'California family of 2, oldest family member is 46'. The status is 'SAVED'. The progress bar shows steps: Summary, Qualifications, Family, Start Date, Payment (current), and E-Sign.

Payment Info

Select Credit Card or ACH Bank Draft

Credit Card
 ACH bank draft

Card number: XXXX XXXX XXXX XXXX
Expiration: MM/YY

First name: [Field]
Last name: [Field]

Street address: 10 Paramount Cir, Sacramento, CA 9

Enter Payment Information

Read the following disclosure to the member:

- You authorize OneShare Health, LLC to draft the provided checking account or charge the provided credit card for this initial transaction, which includes your first monthly contribution and fee and a one-time application fee.
- You also give authorization to automatically draft your checking account or charge your card each month for all subsequent monthly contributions, fees and the \$45 annual administration fee due on your program year anniversary date.
- You also confirm that you are the owner of or authorized to use the account or credit card you provided in your application for enrollment.
- You understand that OneShare may change monthly contribution amounts at any time and will notify you of any such change.

I have read the above payment disclosure to the member

Read Disclosure to Client and Check the Box if they Agree

Save & continue

Click Save & Continue to Proceed to the Next Step of the Enrollment

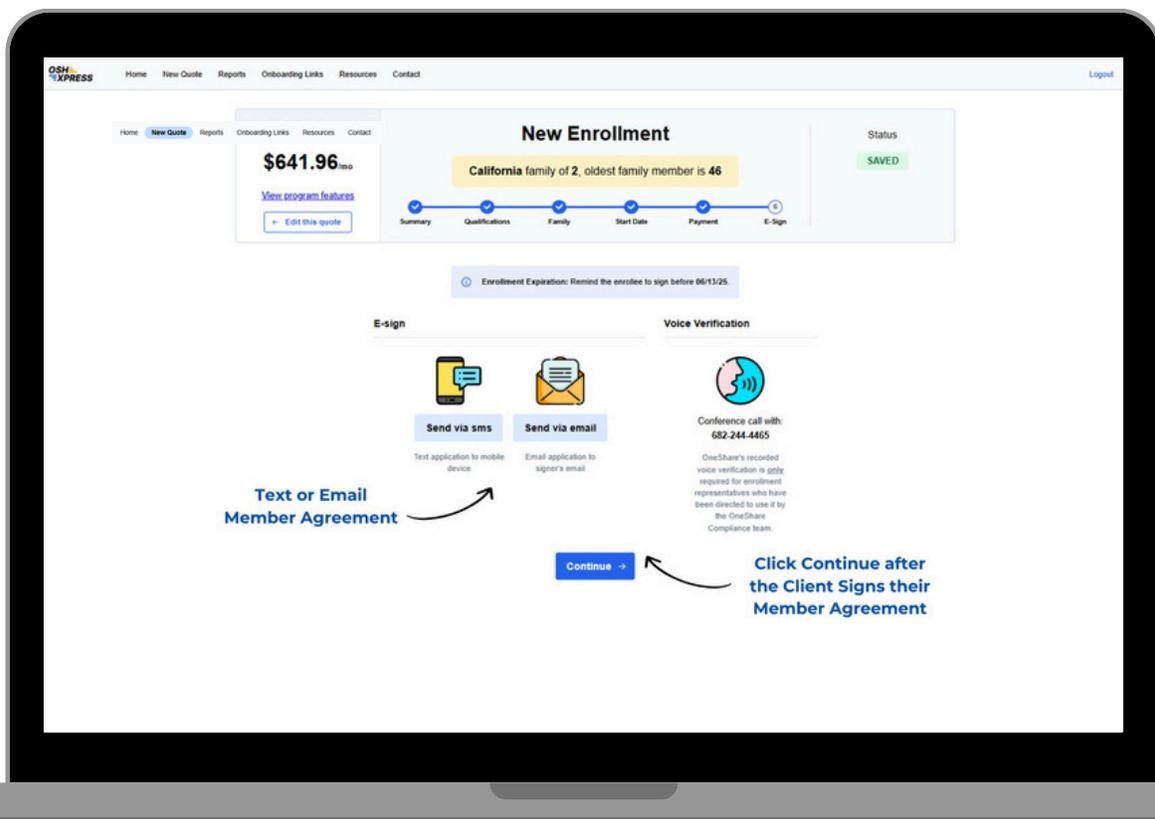
How to Enroll a Member



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.



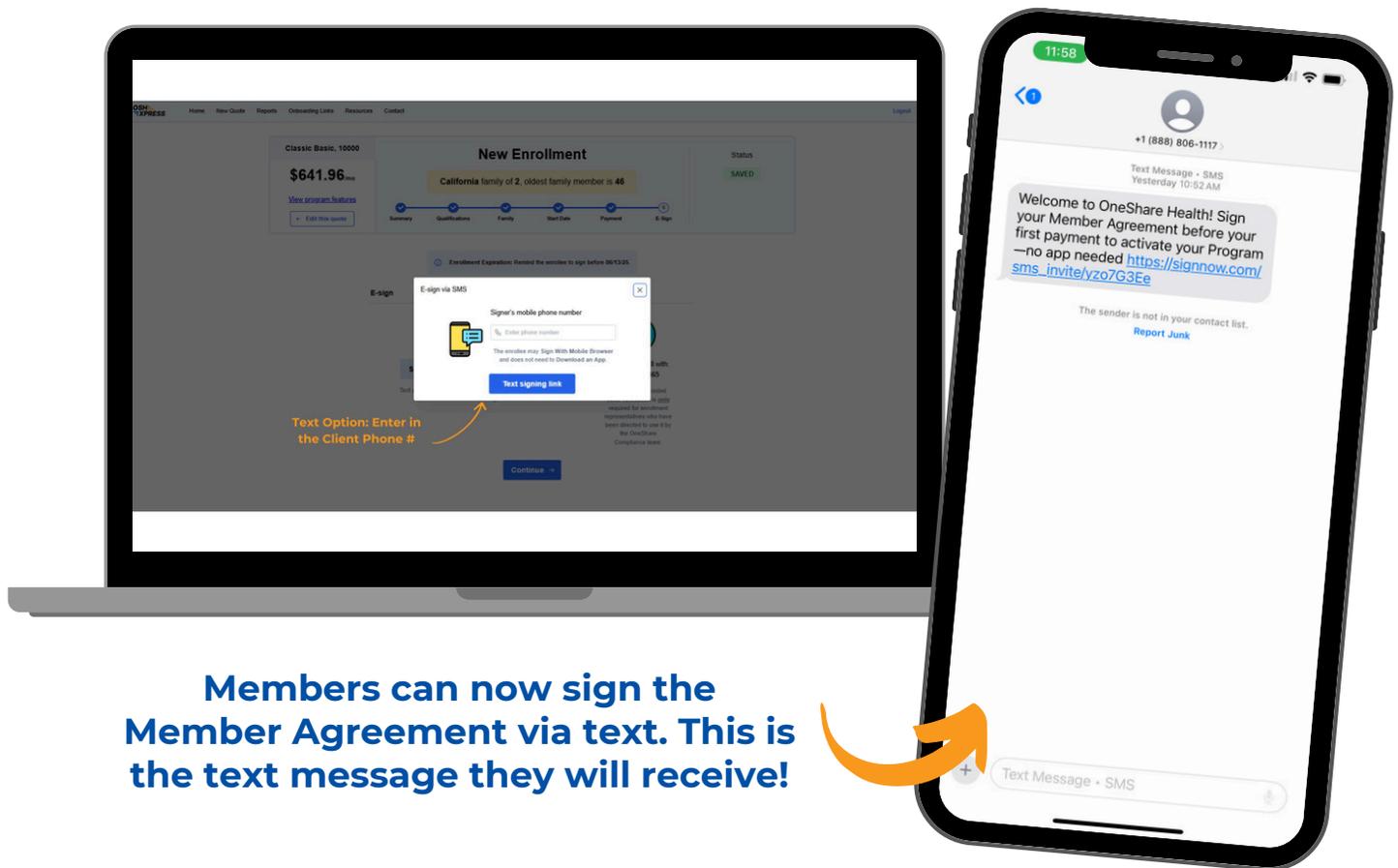
How to Enroll a Member



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.



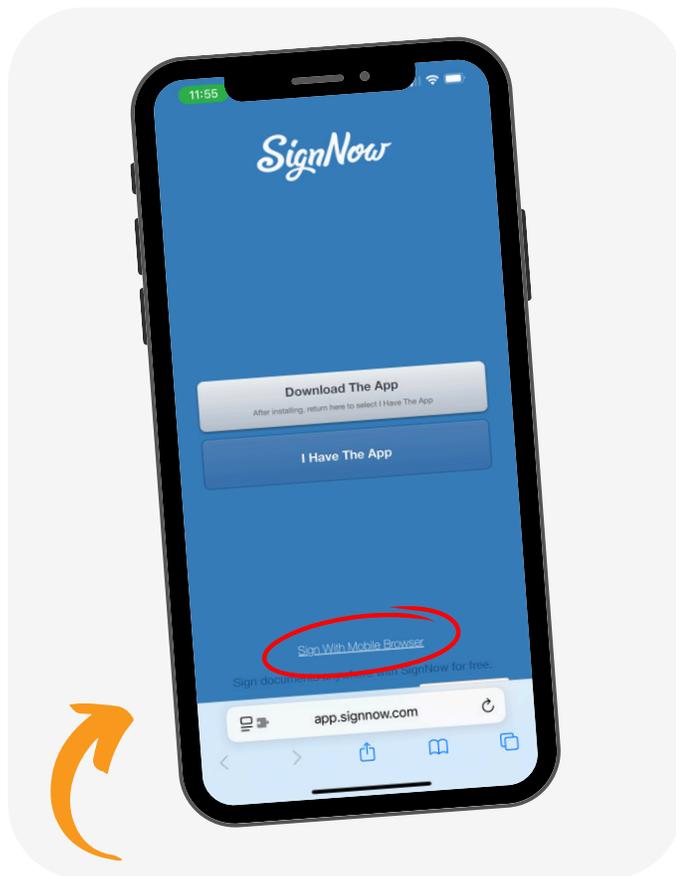
Members can now sign the Member Agreement via text. This is the text message they will receive!

How to Enroll a Member

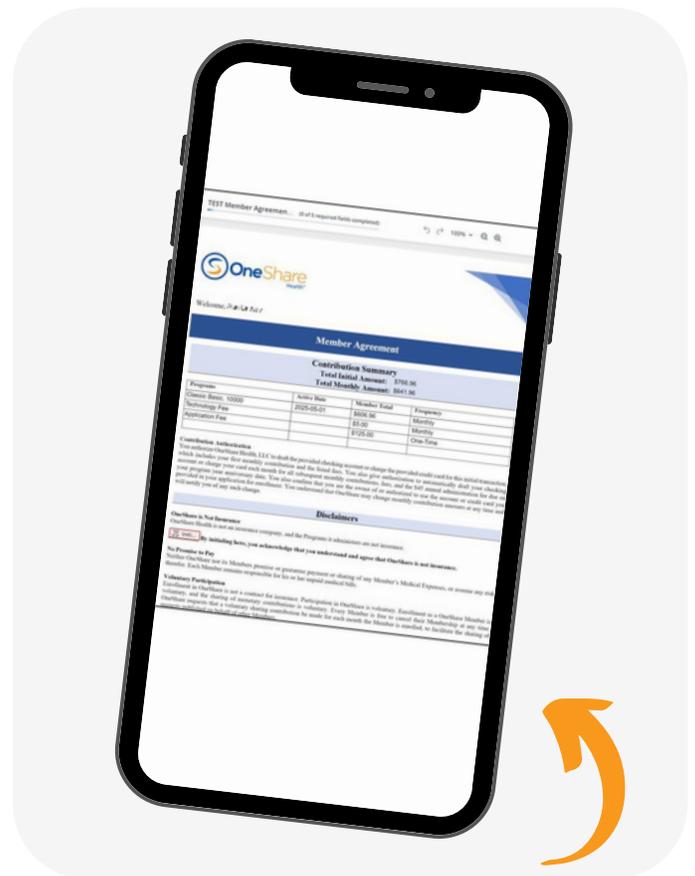


STEP 12: Texting Option (Continued)

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



All the Member must do is click “Sign With Mobile Browser” at the bottom of the screen to proceed.



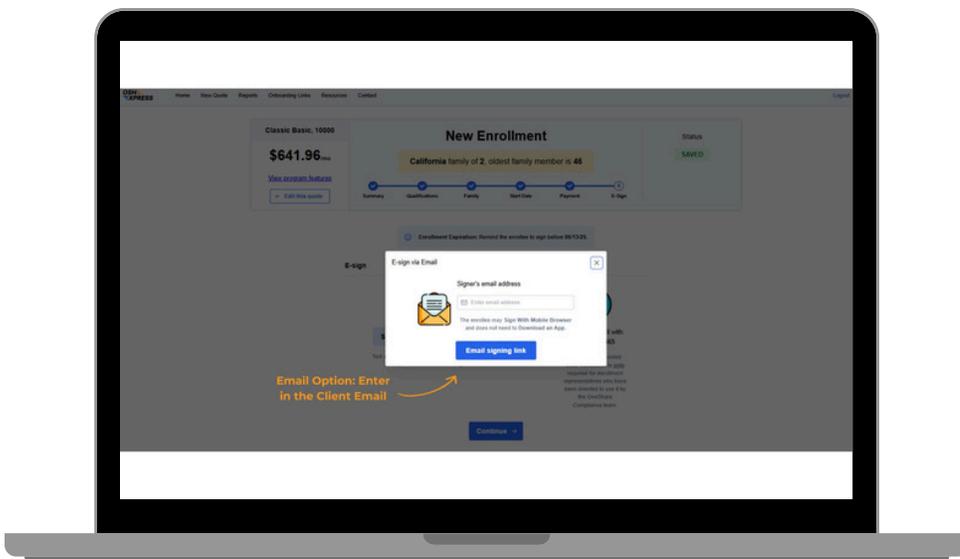
On the Member Agreement, they will initial where instructed and sign at the bottom.

How to Enroll a Member



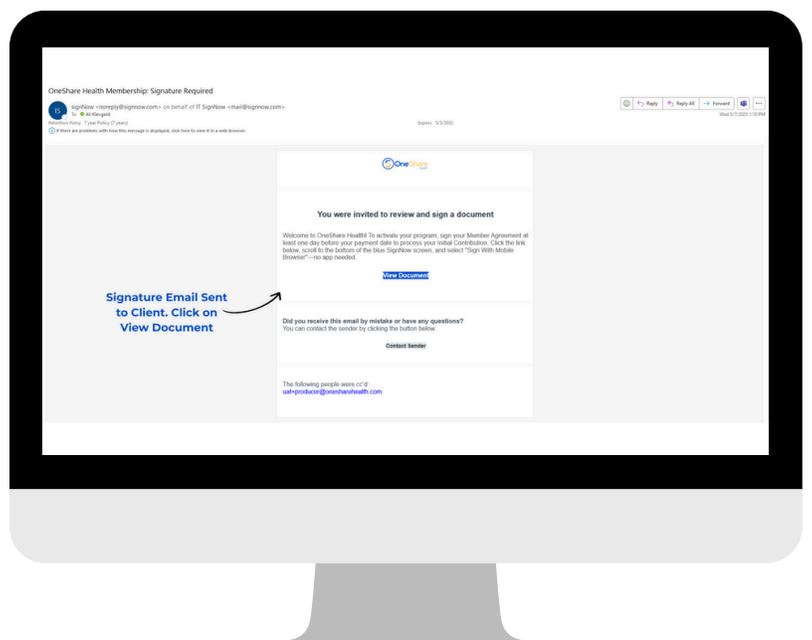
STEP 13: Email Signature Option

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



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.

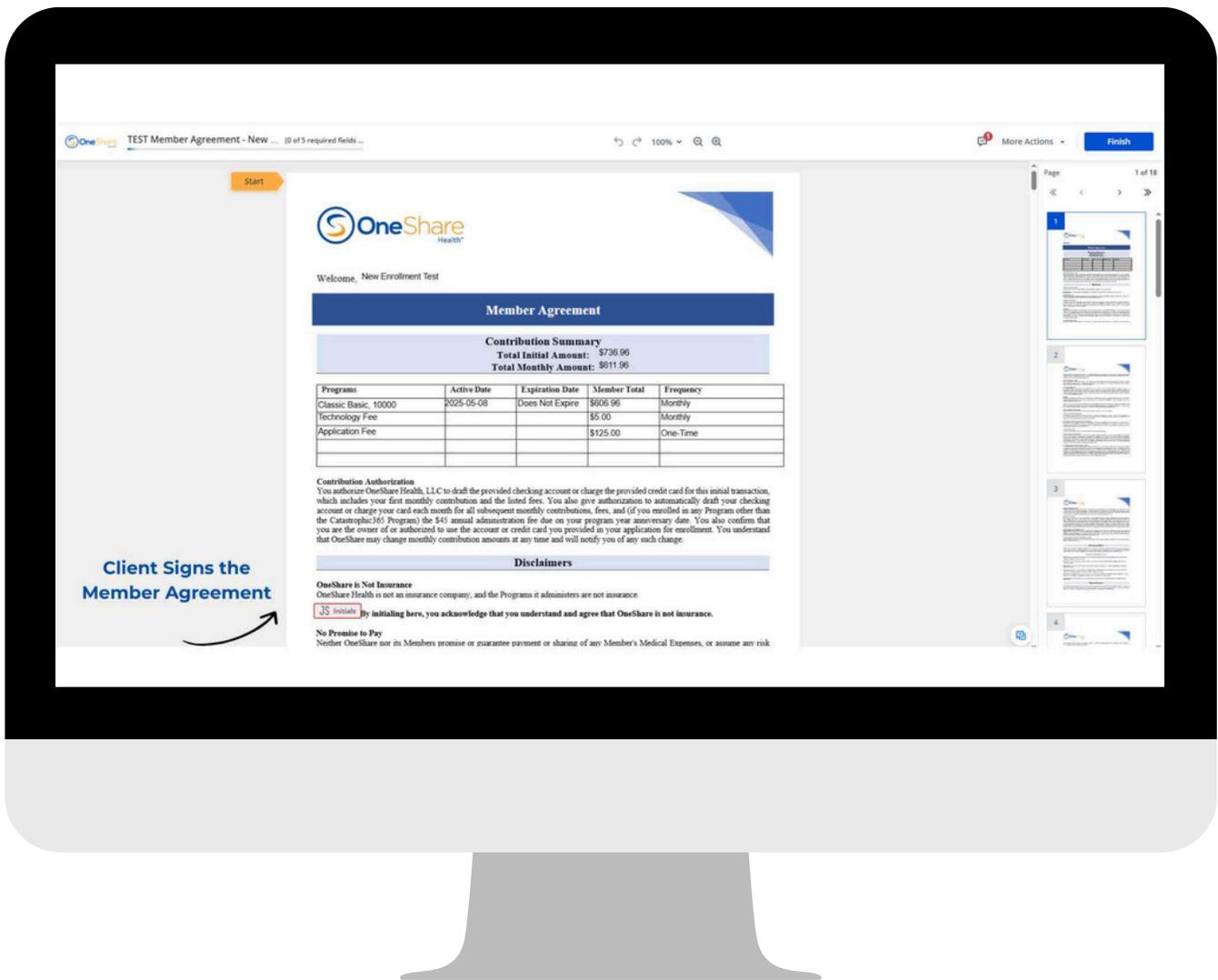


How to Enroll a Member



STEP 13: Email Signature Option (Continued)

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



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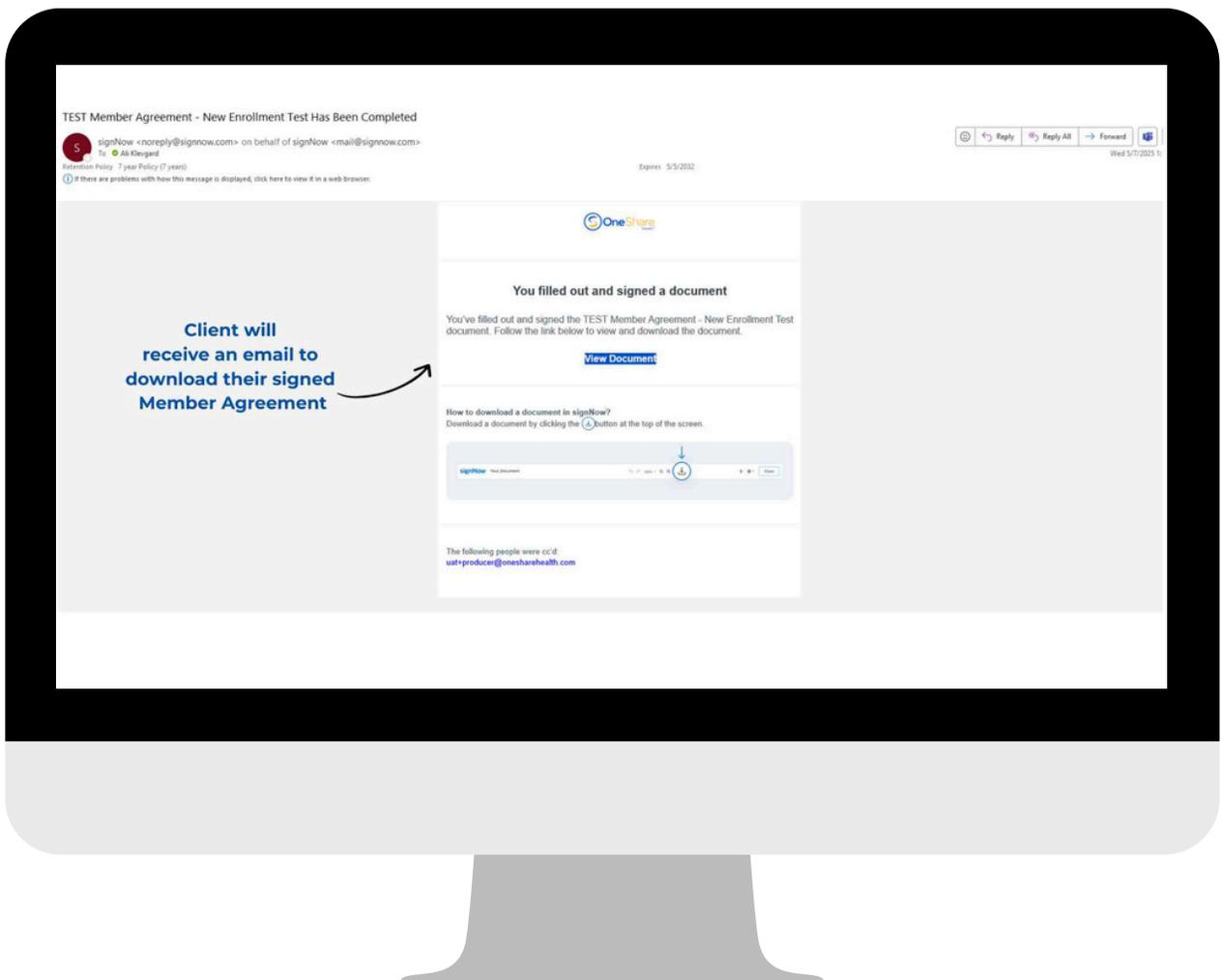
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How to Enroll a Member



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.



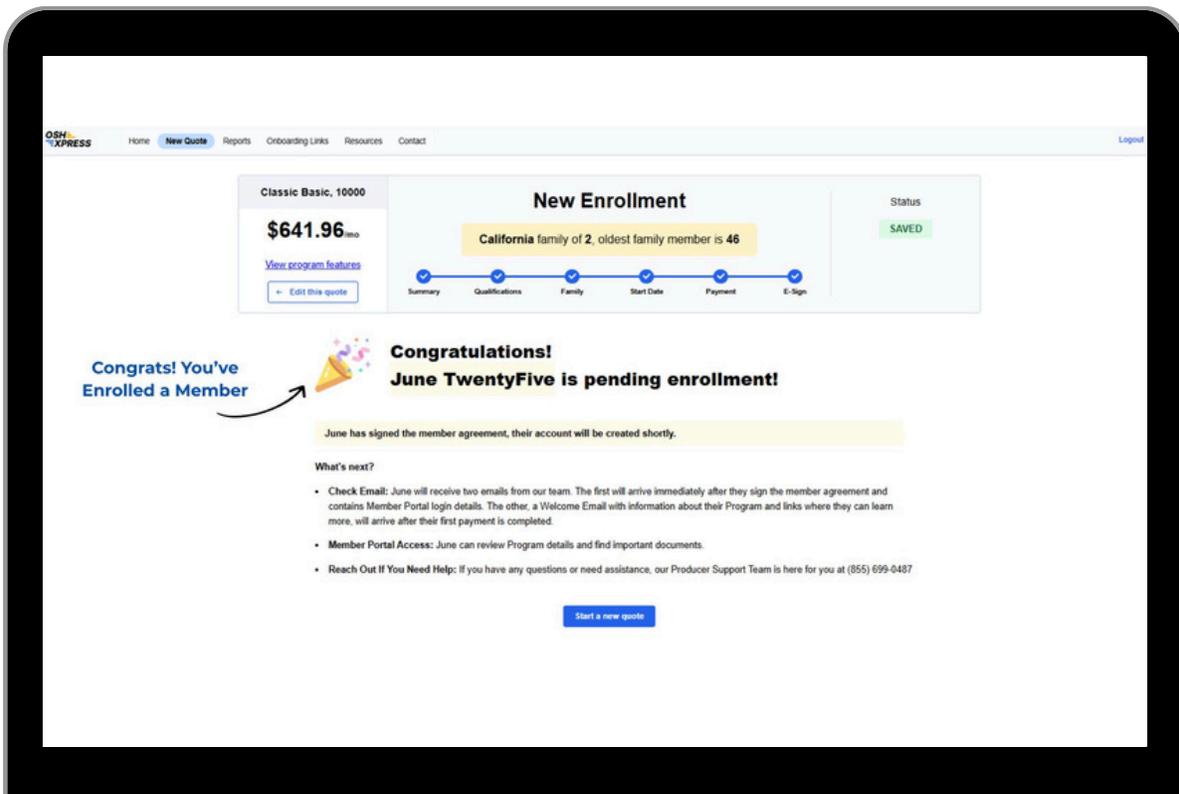
How to Enroll a Member



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.



How to Enroll a Member



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



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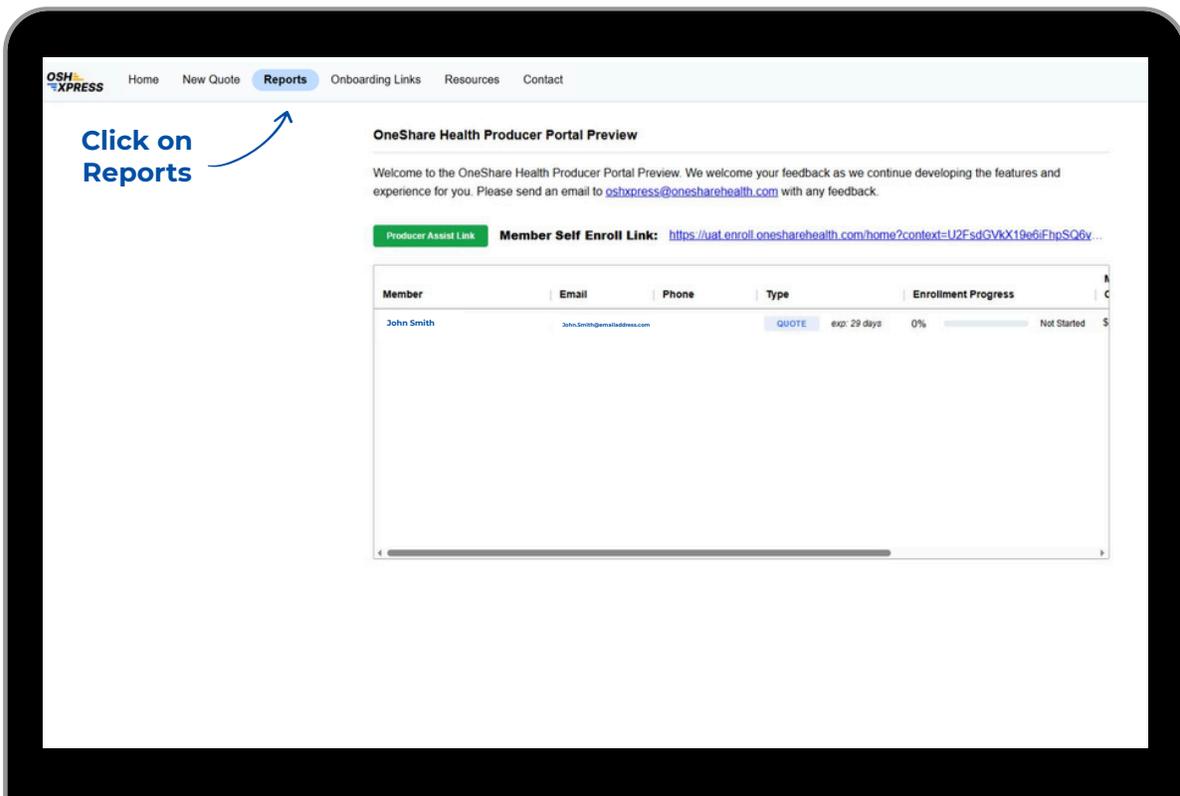
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Reports



STEP 1: Click on Reports

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

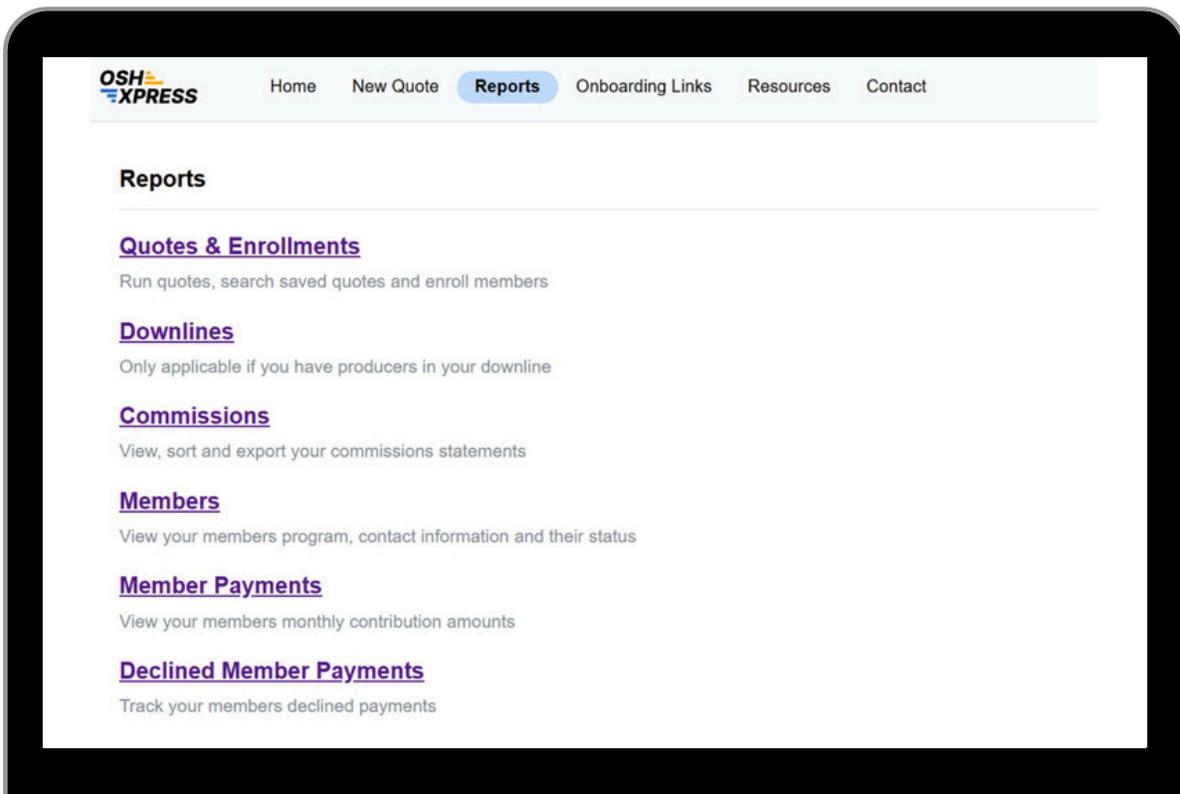


Reports



STEP 2: Report Page View

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



Reports



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.

Contracting



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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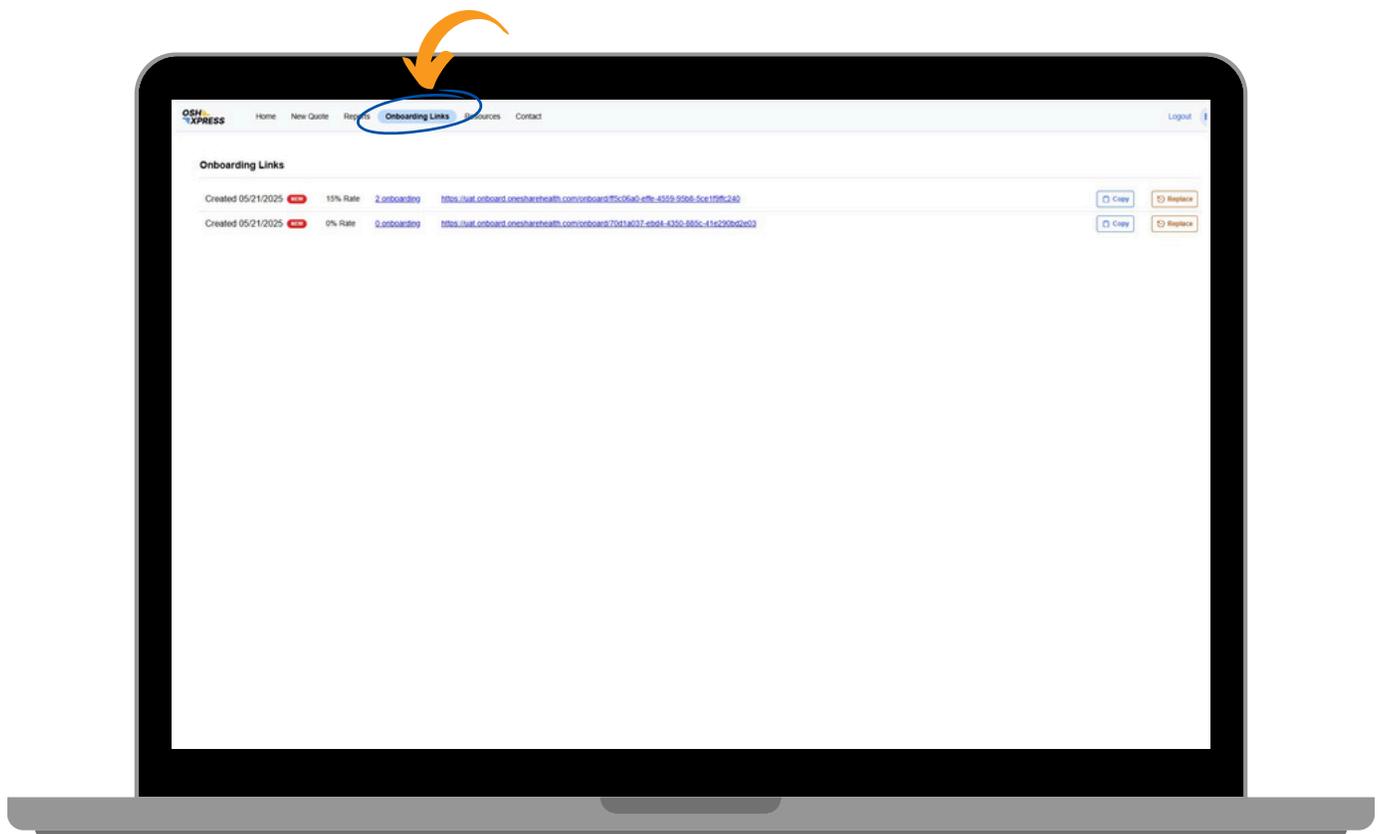
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Contracting



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.

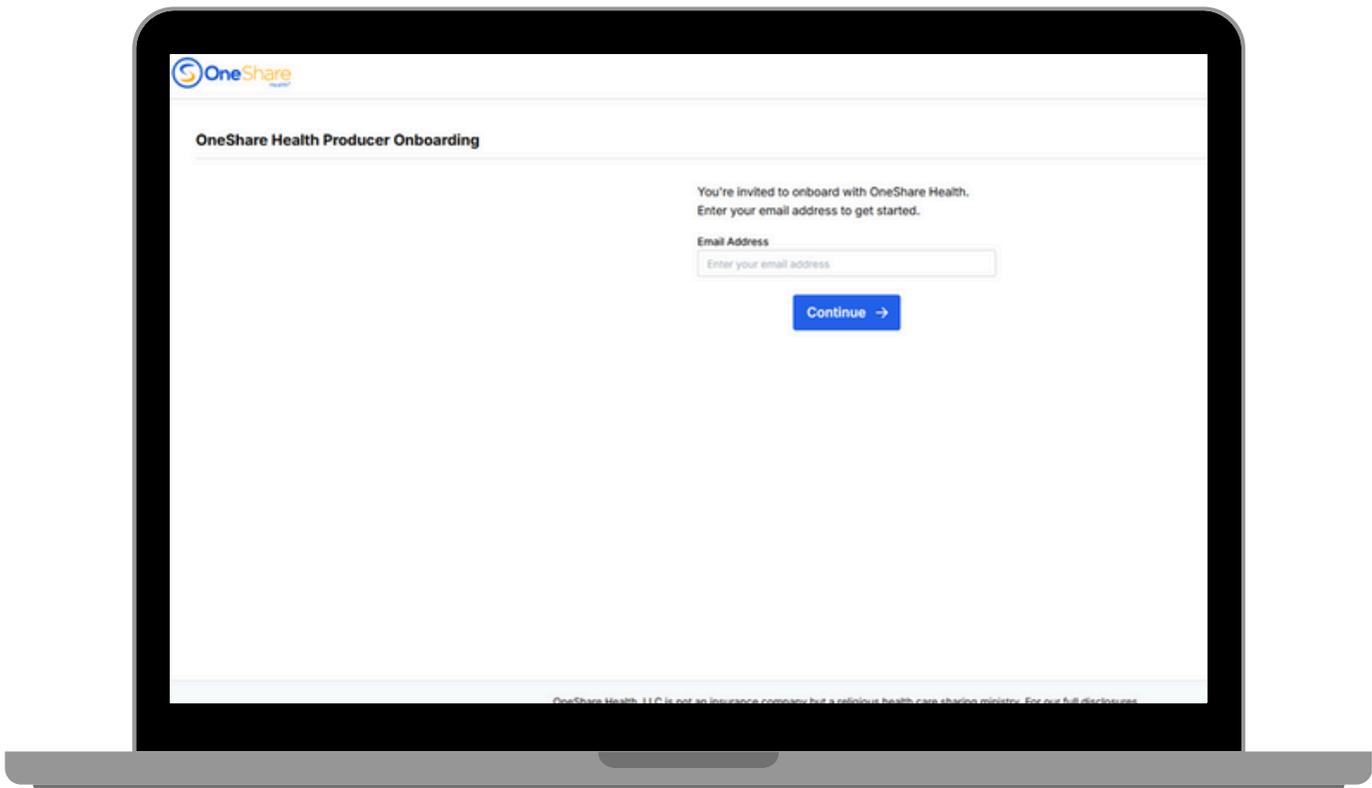
Contracting



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.

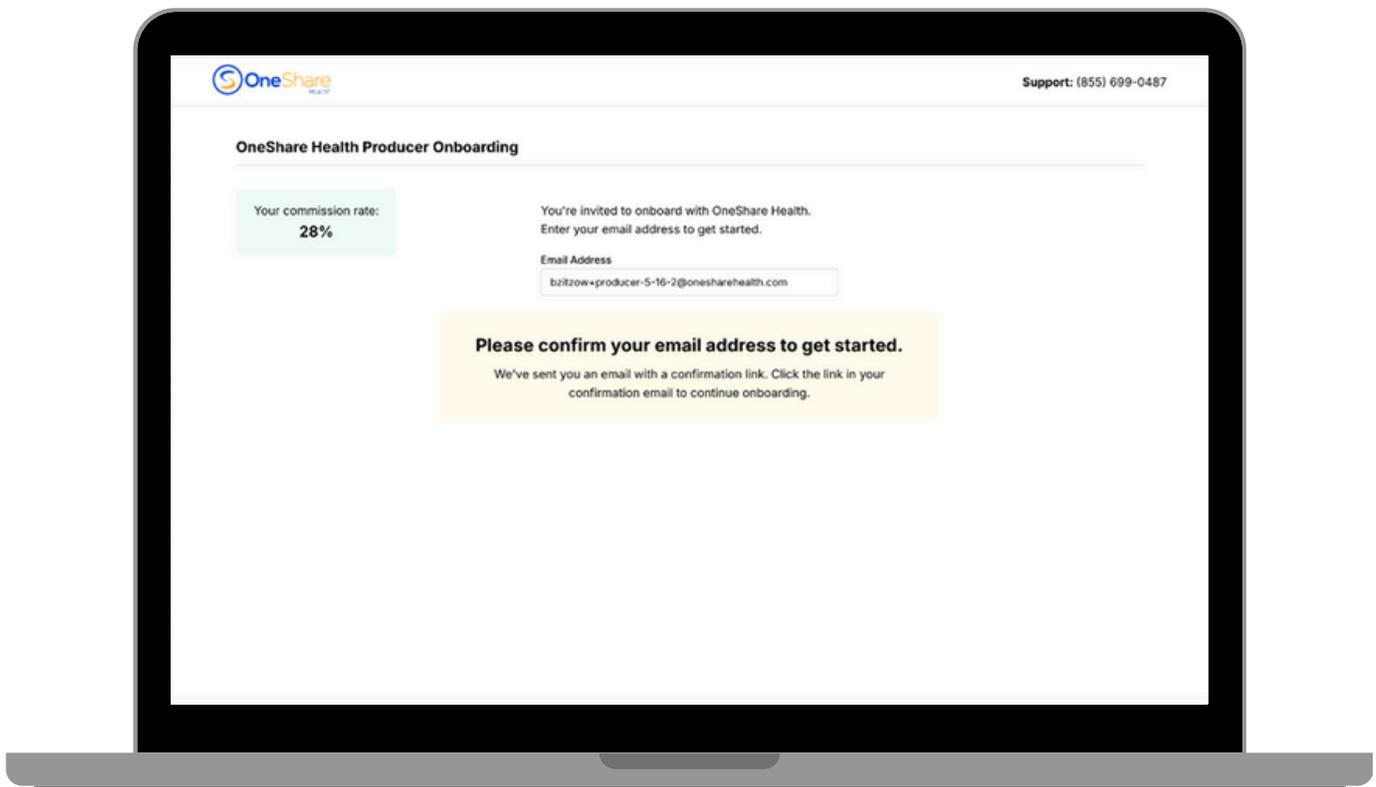
Note: *If the onboarding link is copied and pasted into a separate email, the system won't track the status until the Producer enters their information.*



Contracting



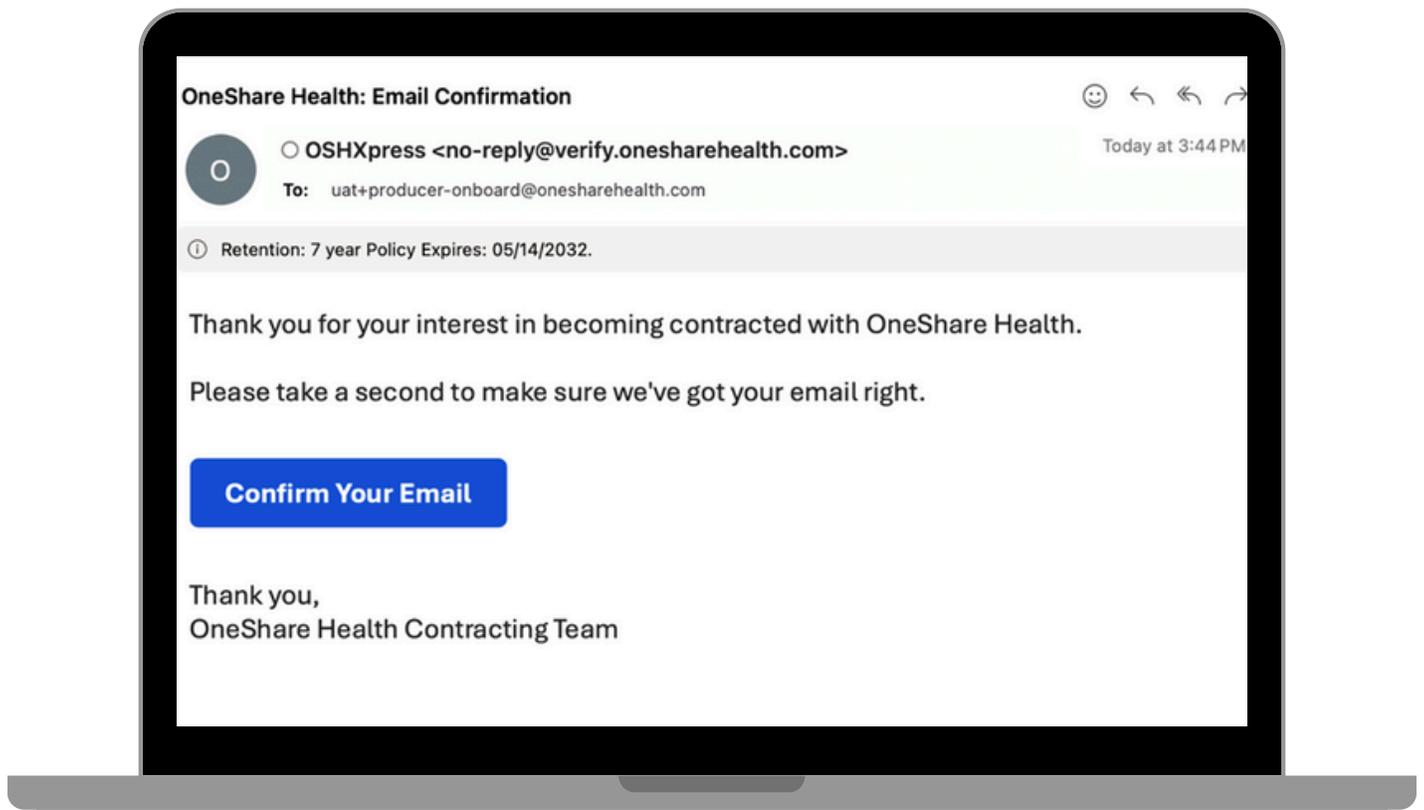
STEP 3: A message will be sent, prompting for an email address to be submitted to get started.



Contracting



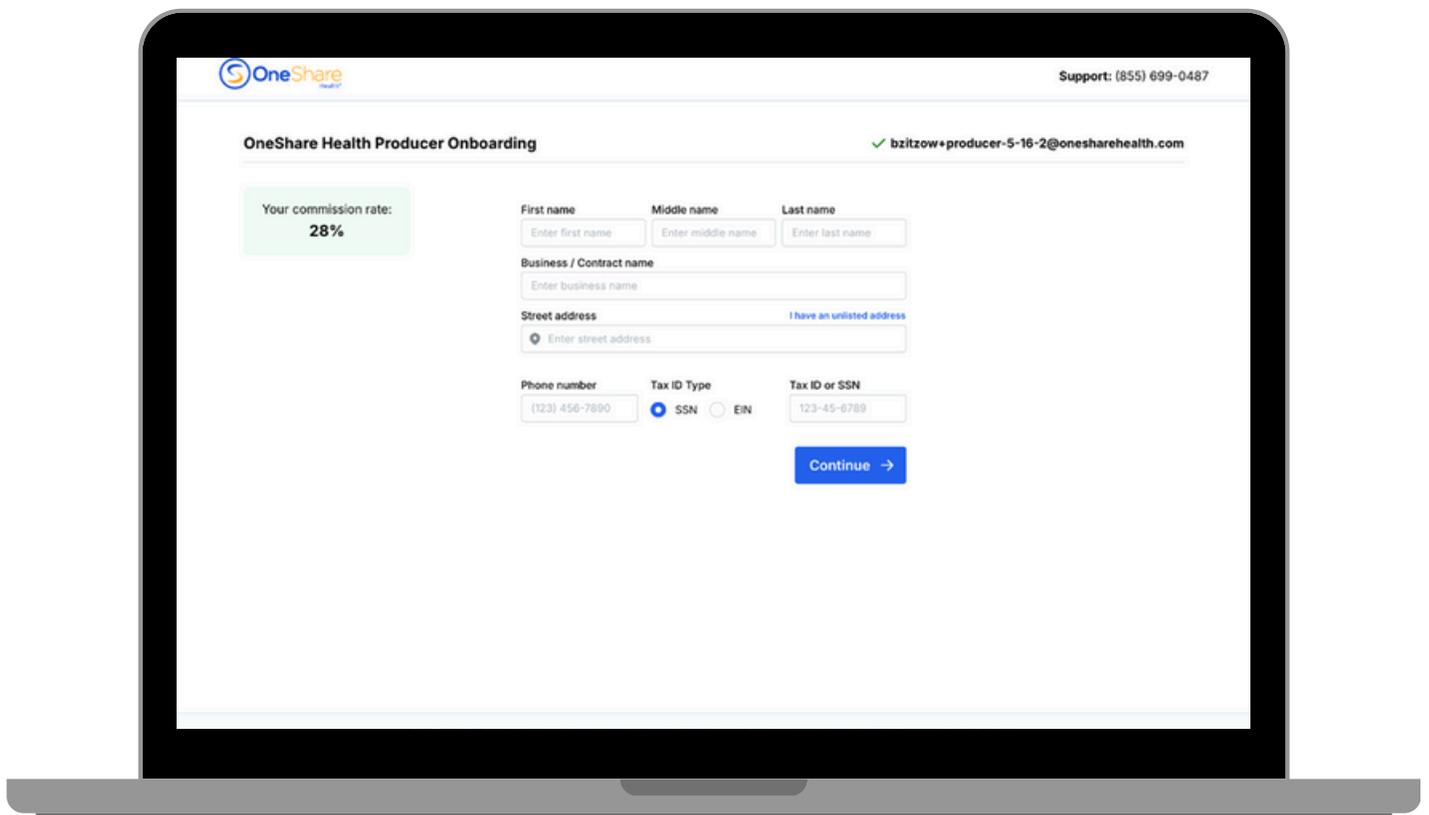
STEP 4: The Producer will receive a "Confirmation Email" asking them to confirm their email.



Contracting



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".



Contracting



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

The screenshot shows a laptop screen displaying a 'Background Attestation' form. The form has a 'Start' button in the top left corner. The main heading is 'Background Attestation'. Below the heading, there is a paragraph of text: '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.' There are three numbered questions, each with radio button options:

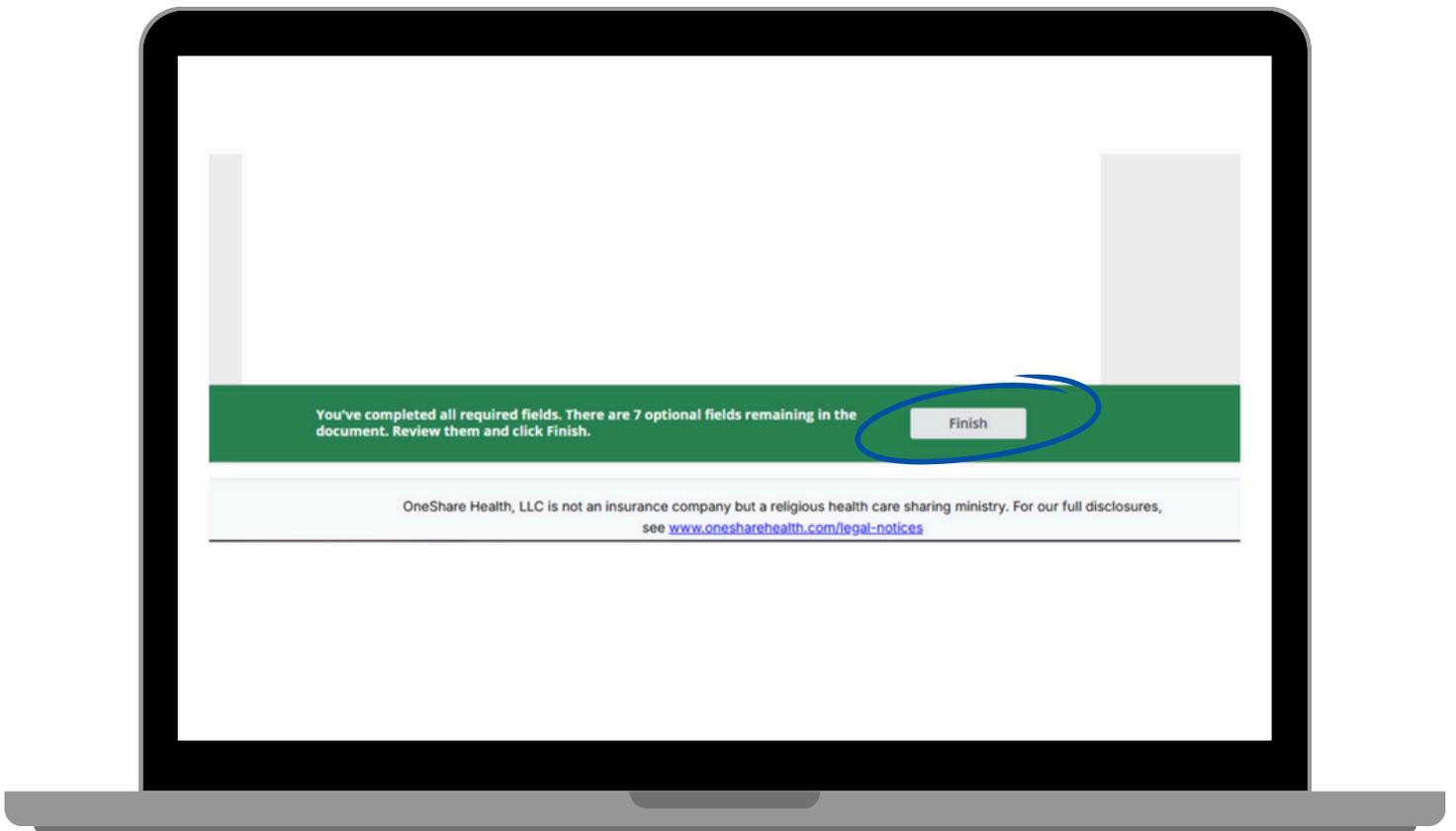
- 1. If you have/had an insurance license, has your license ever been suspended or revoked in any jurisdiction?**
 YES NO I have never held an insurance license
- 2. Have you ever been convicted of a felony?**
 YES NO
- 3. Have you ever been convicted of a misdemeanor involving money or property?**
Examples 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.

Contracting



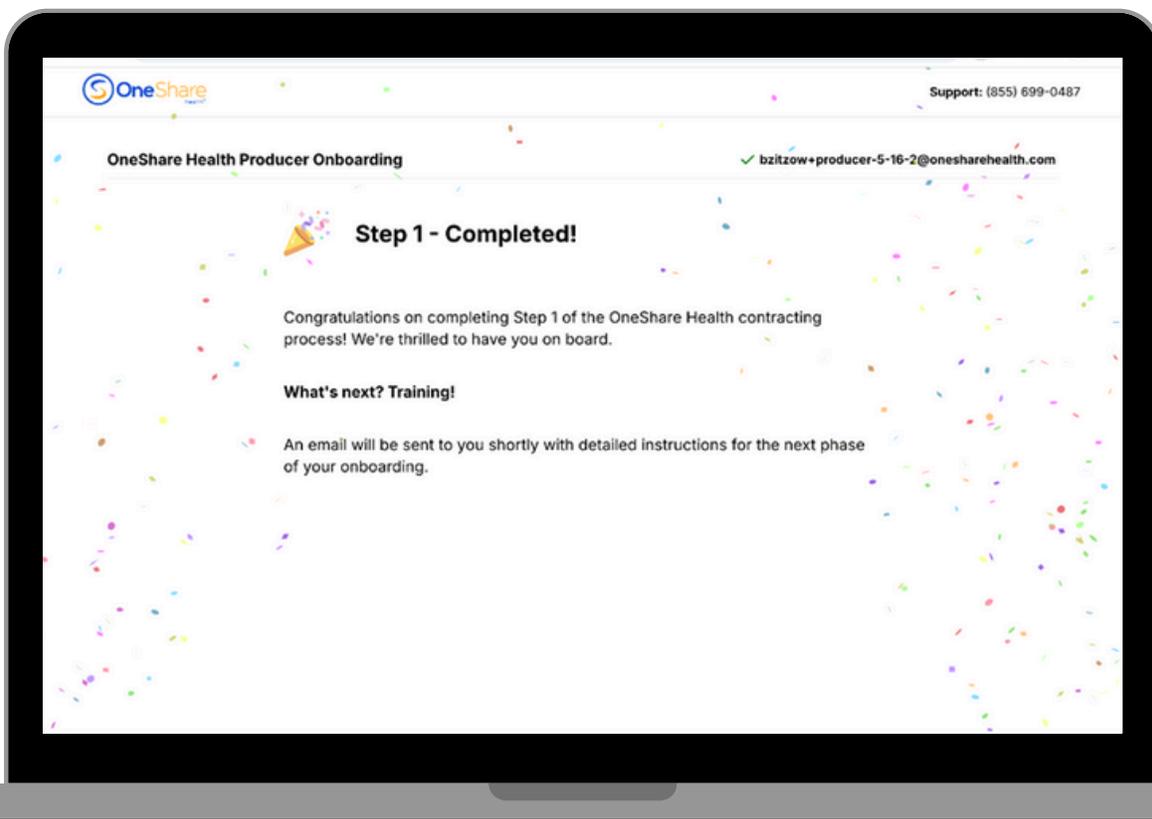
STEP 7: Once the Producer is done signing, they will click on "Finish" and their contract will be submitted to OneShare Health.



Contracting



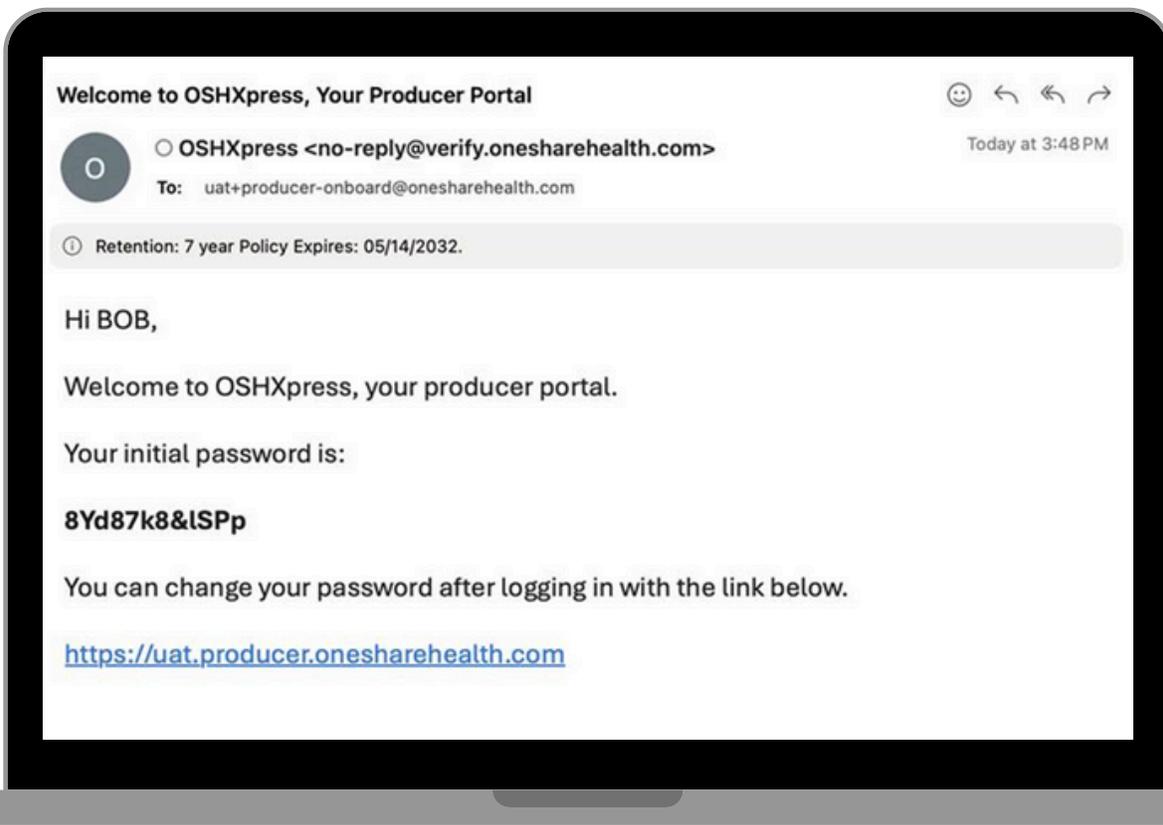
STEP 8: After their Contract has been submitted , they will be redirected back to OSHXpress and will see the the page below. The Producer will receive an email with their Producer Portal Credentials so they can log in and do their training.



Contracting



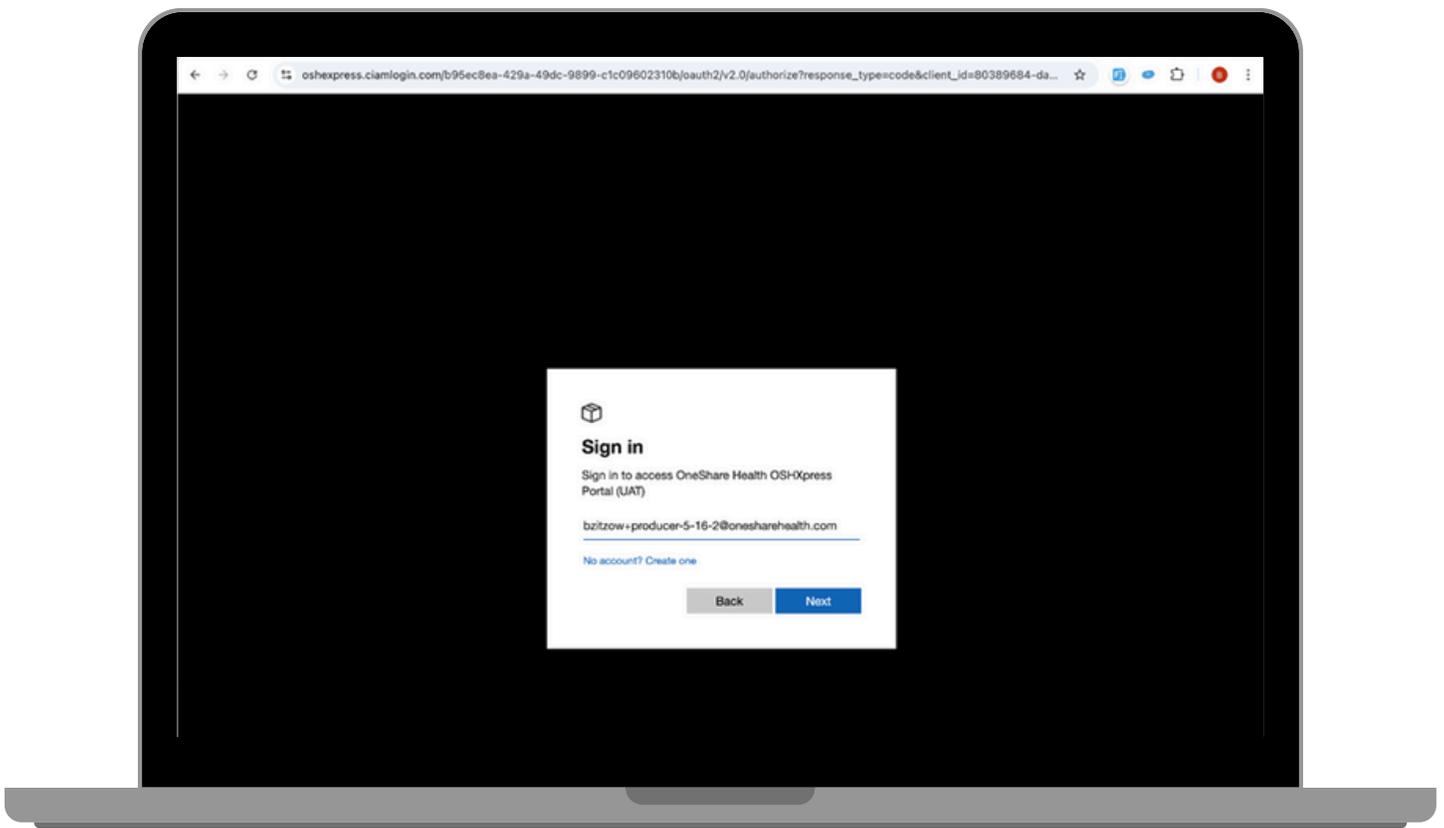
STEP 9: Below is the email that the Producer will receive. The Producer will need to click on the Producer Portal link provided within the email.



Contracting



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

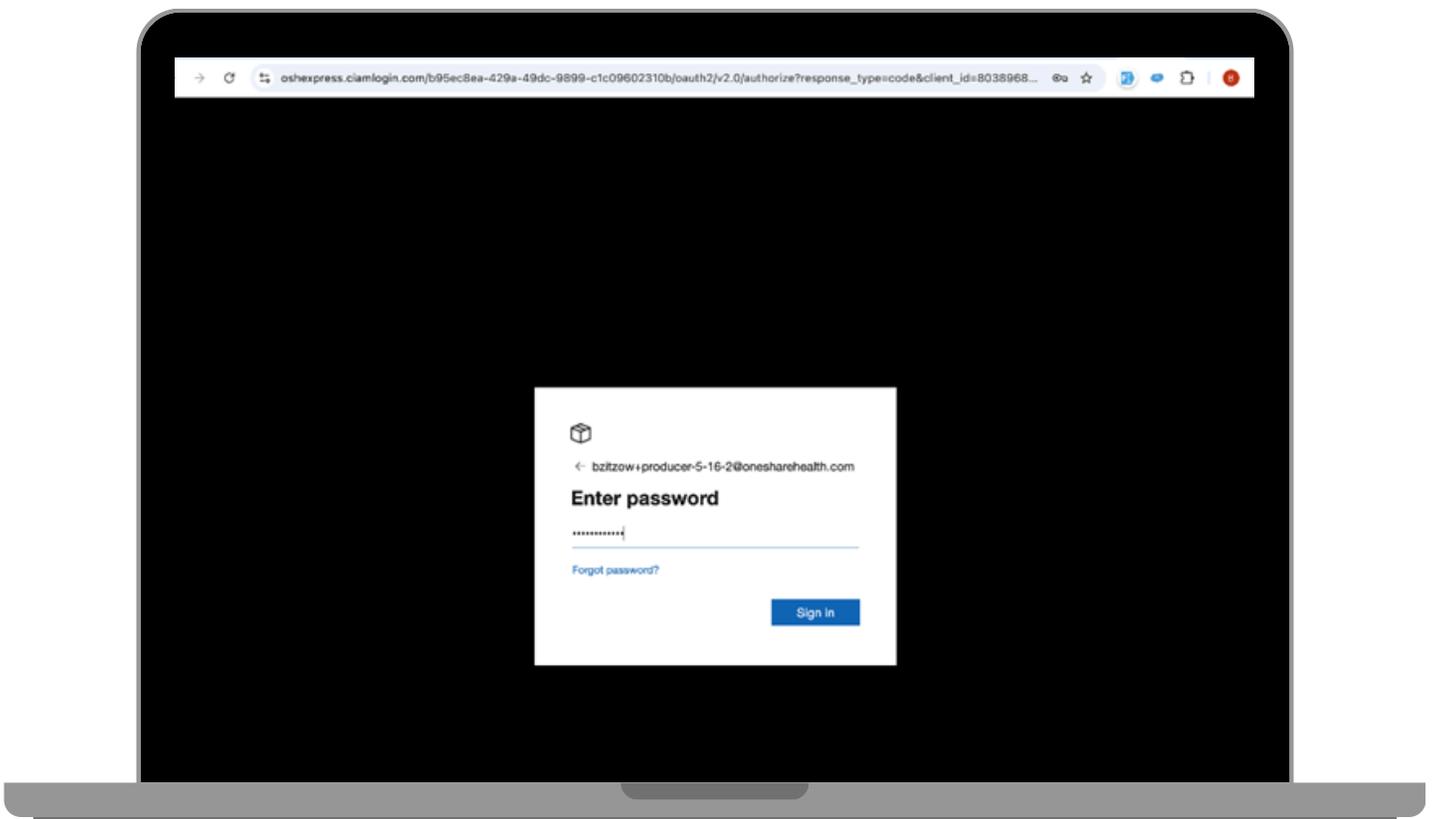


Contracting



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.

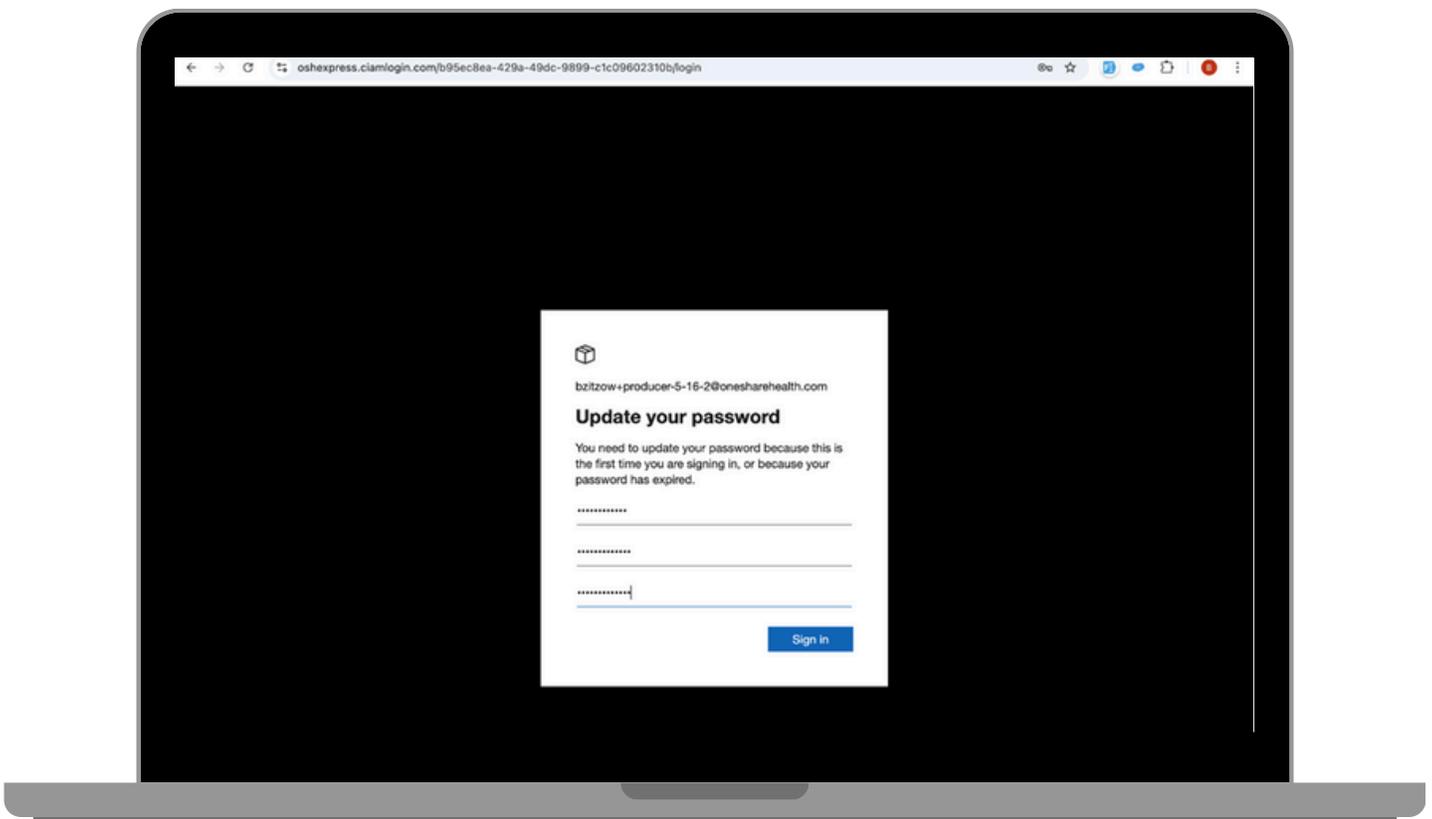
NOTE: If you copy and paste the temporary password, make sure you don't have an extra space.



Contracting



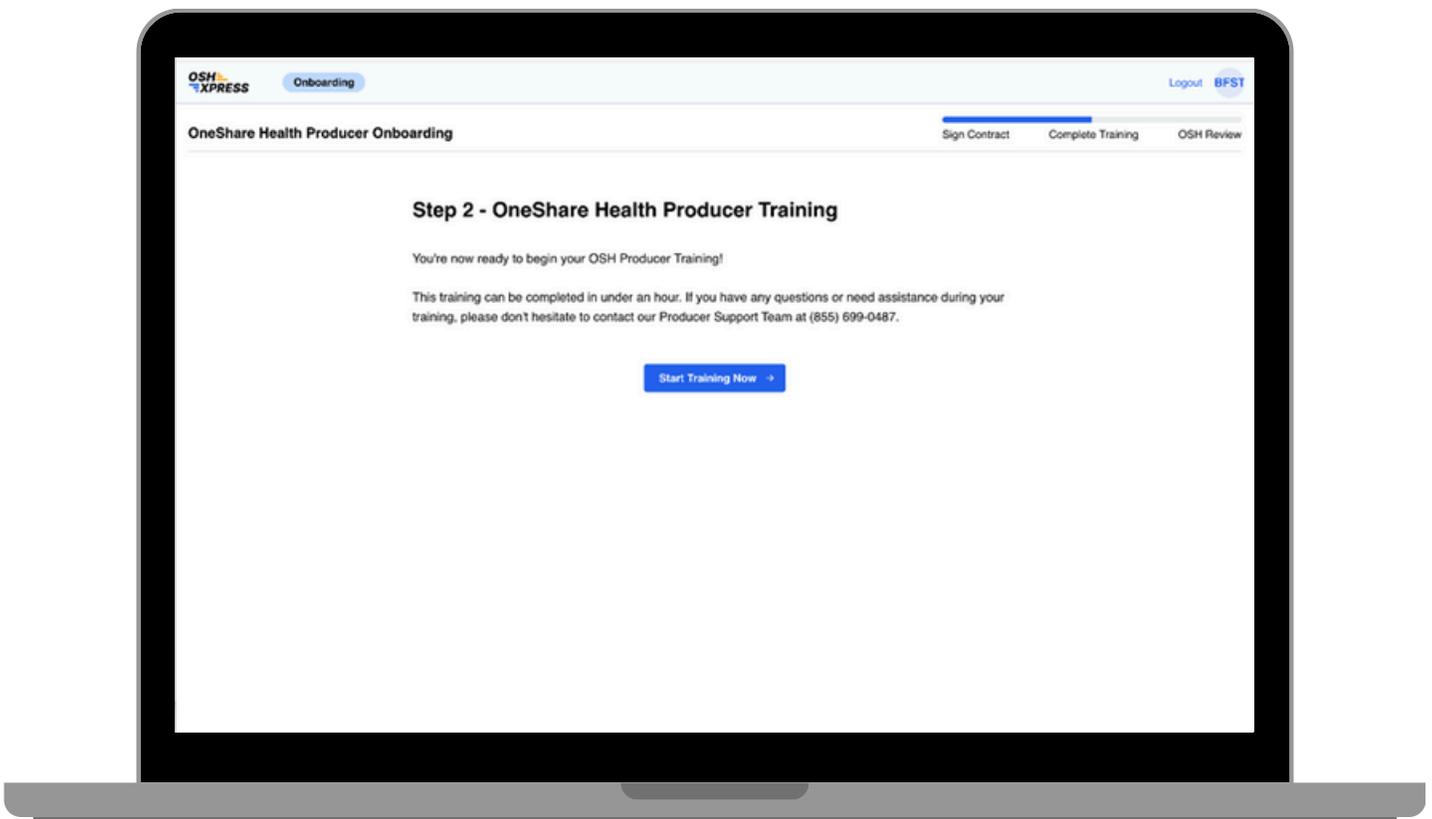
STEP 12: The Producer will be prompted to make a new password and click, "Sign In."



Contracting



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

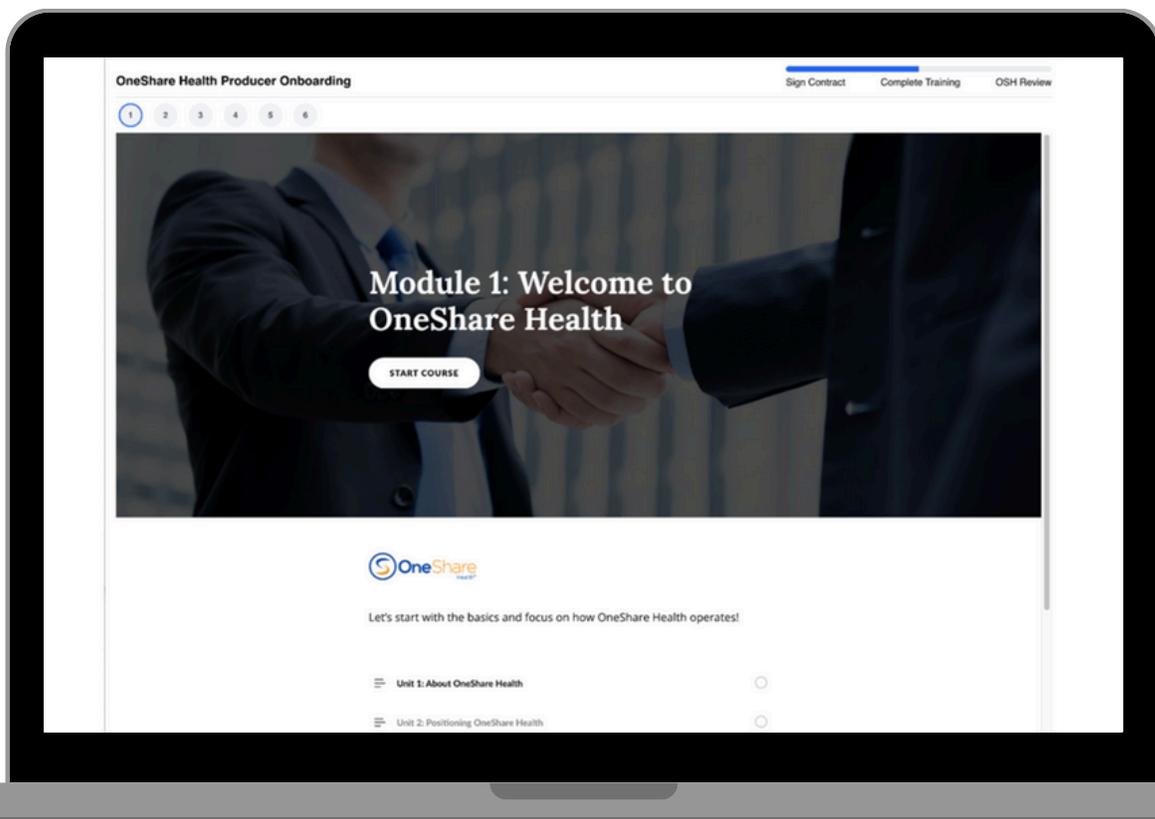


Contracting



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.

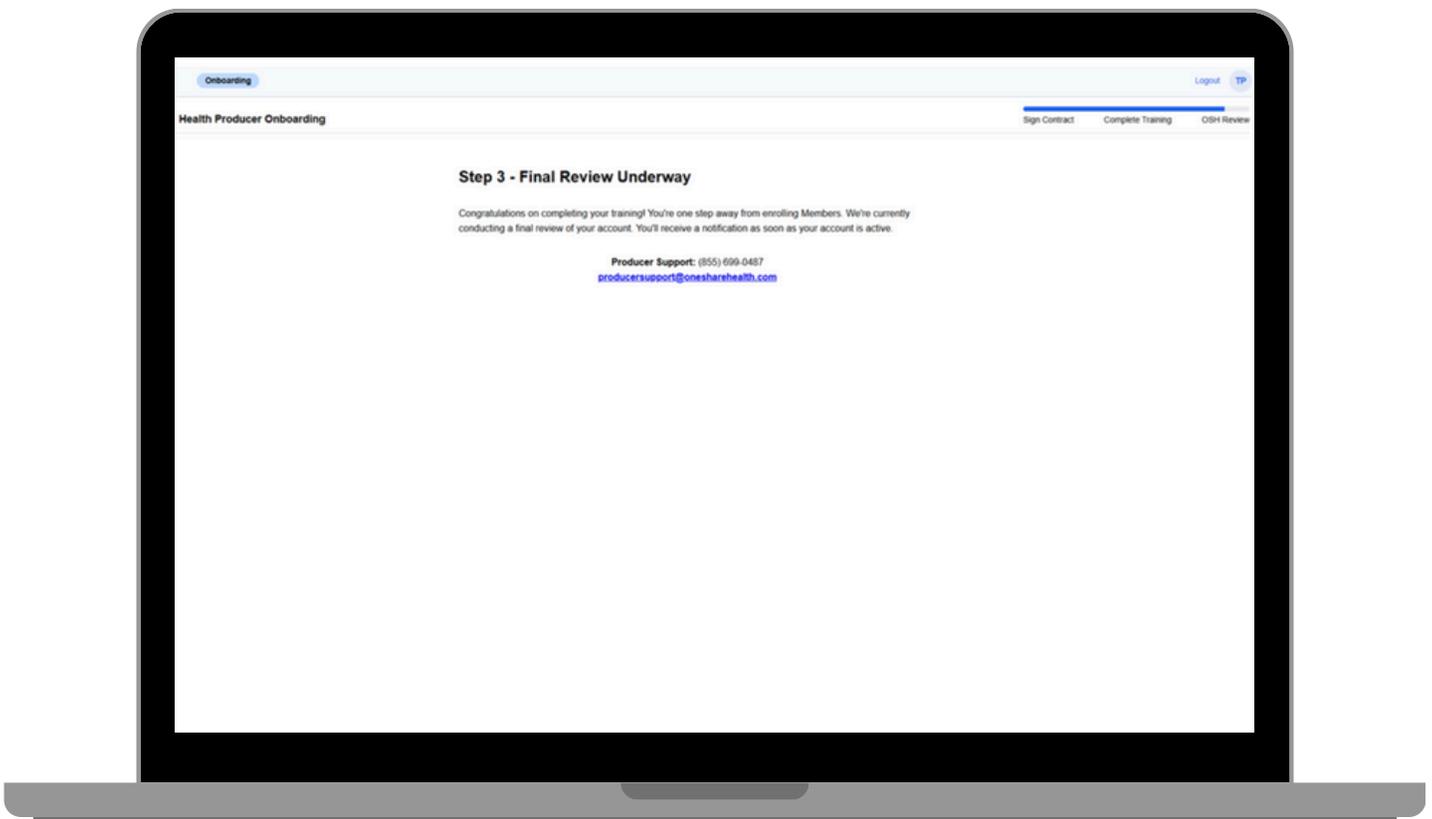
NOTE: There are Knowledge Checks built in throughout the training modules and Producers must score 100% on each.



Contracting



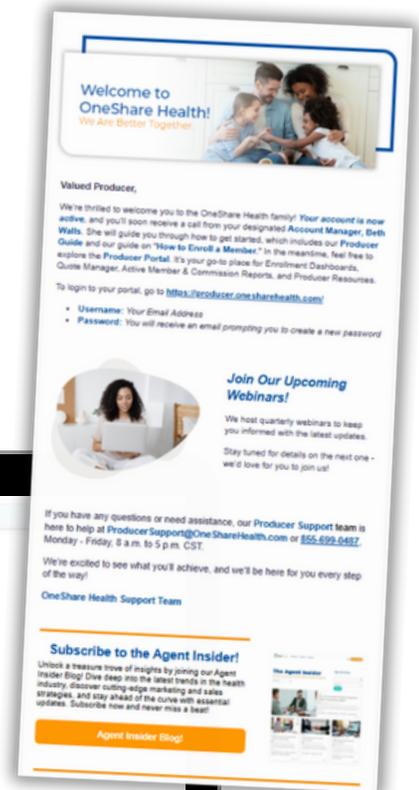
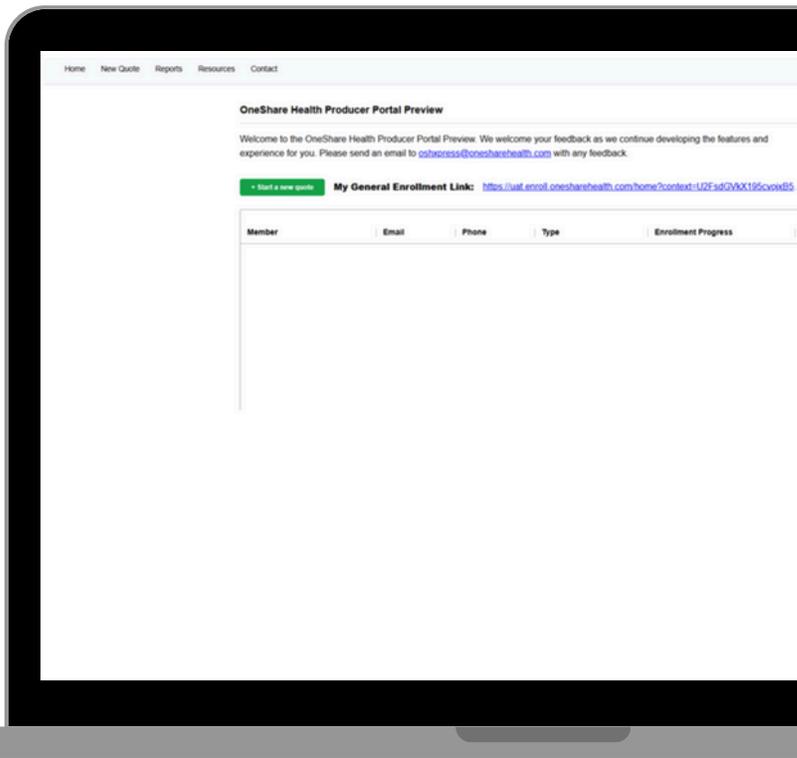
STEP 15: After the Producer has completed their training, their screen will say "Step 3-Final Review Underway." This means the OneShare Health Contracting Department is reviewing their Contract.



Contracting



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.

Producer FAQs



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 <https://producer.onesharehealth.com/>

Question 6: Will my login credentials change?

Answer: Yes, you will receive an email from no-reply@verify.onesharehealth.com 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 <https://member.onesharehealth.com/>

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.

Producer FAQs



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.

Producer FAQs



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.

Producer FAQs



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 contracting@onsharehealth.com 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.

Producer FAQs



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 no-reply@verify.onesharehealth.com 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.

Producer FAQs



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 on when they finish, all steps included, within the onboarding process.



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



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