HOW TO ENROLL A MEMBER

Getting Started

This step-by-step guide will walk you through providing a quote, enrolling a Member, and the Member experience. If you have not logged in to the Producer Portal, go to the Producer Resource Hub you will see a link to the Producer Portal page which includes a video and FAQ.



STEP BY STEP

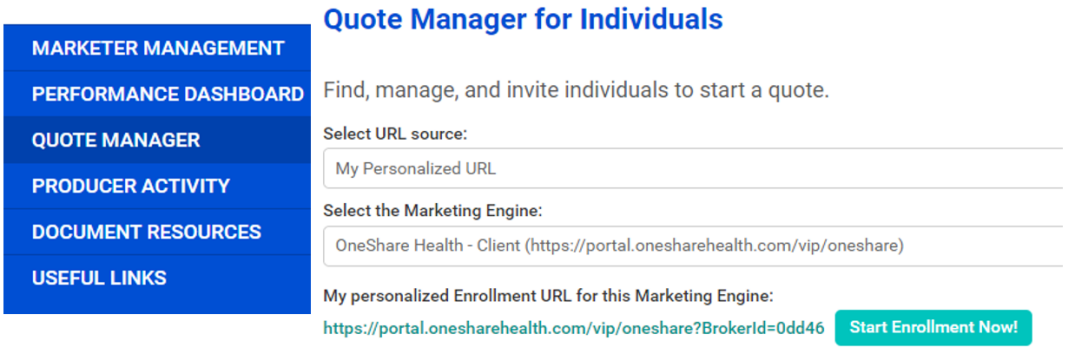
STEP 1

Login Link: https://portal.onesharehealth.com/Logon/

If you are logging in for the first time, your username will be the email you have on file and the password will be Password#1. This will prompt you to create a new password.

STEP 2

From the homepage of your Producer Portal, select **Quote Manager** on the navigation bar on the left. After selecting Quote Manager, check to make sure you have a Personal Enrollment URL or Writing Link. If you do not have a Writing Link and see an error message, please reach out to Producer Support.

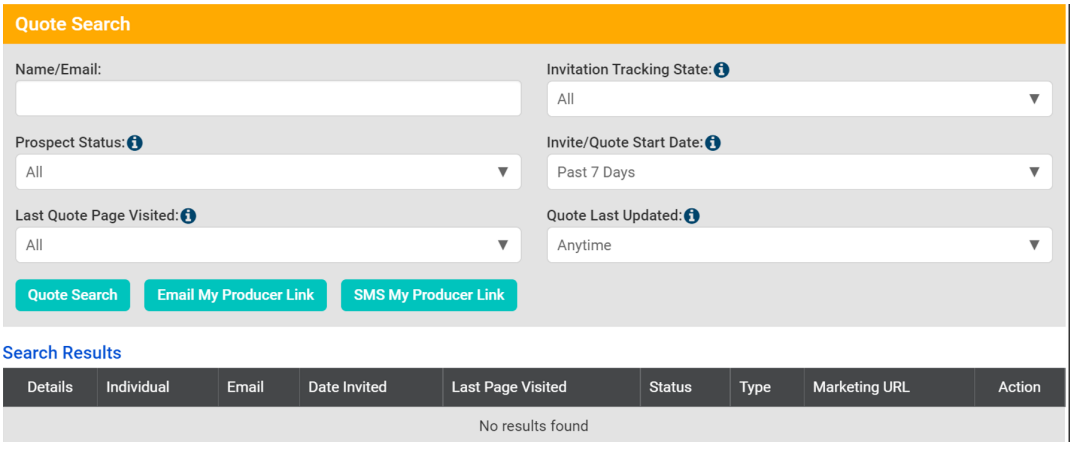


STEP 3

The Quote Search tool is available from the Quote Manager tab. You can search for quotes using the prospect's name or email. You can also find the most recent quotes from the search results.

To resume an application, select the hyperlink to take you where you left off.

Please Note: If the Member uses a Member-Initiated URL, you will not be able to continue where they left off.



STEP 4

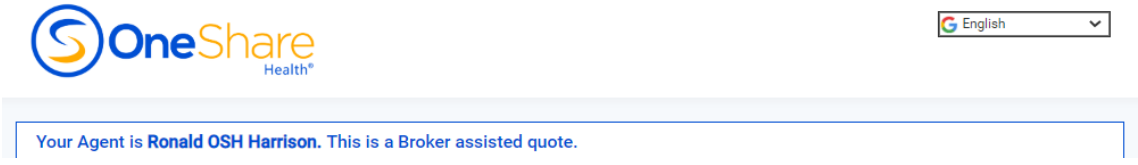
Select the Start Enrollment Now button to begin a quote. You also have the ability to text or email your producer link to the Member and they can complete the enrollment on their own.

Please Note: For Members who would like to complete the enrollment on their own, talk through the Programs, and fully explain OneShare Health (not insurance) before they sign themselves up.

STEP 5

By clicking the **Start Enrollment Now** button, the **Start Quick Quote** page will open.

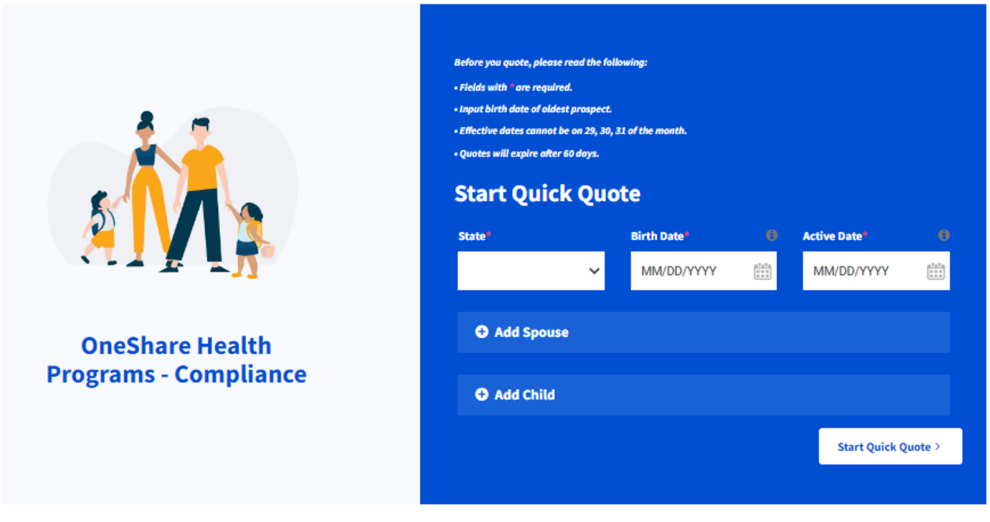
NOTE: Change the language by using the Google Translate dropdown at the top right of the screen.



Enter the applicable information in the fields below:

State *(OneShare Health is not available in WA, PA, MA, MT, NM, VT, and MD)*
Birth Date *(Must be the DOB of the oldest prospect)*
Active Date *(Active Date cannot be on the 29, 30, or 31 of the month)*

Select Add Spouse or Add Child to add dependents and enter their dates of birth.



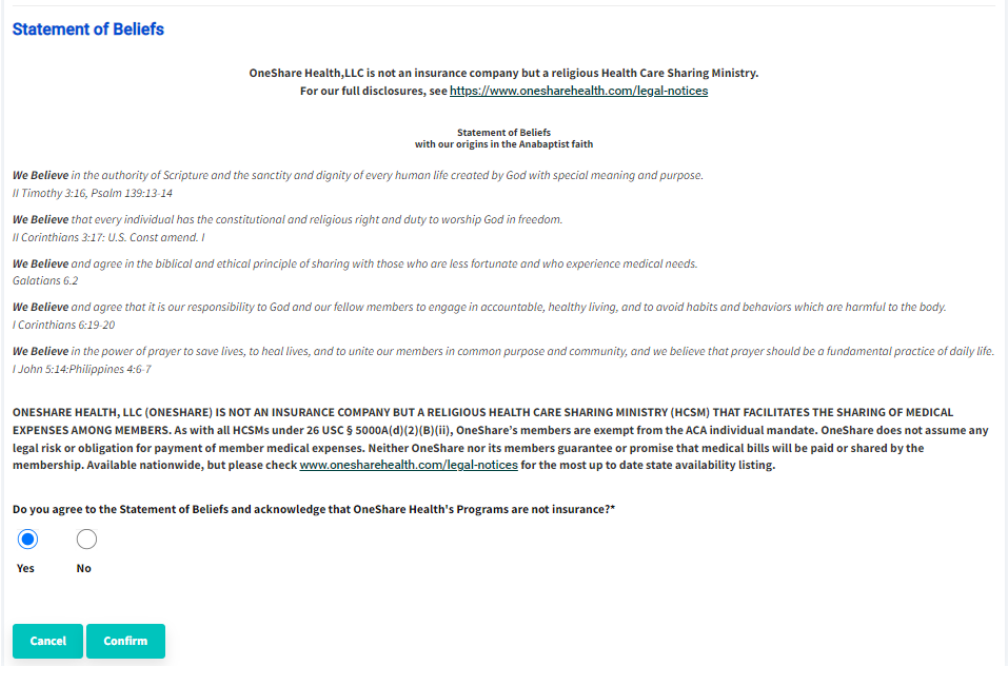
Once done adding all information you can continue with the application by selecting **Start Quick Quote**.

STEP 6

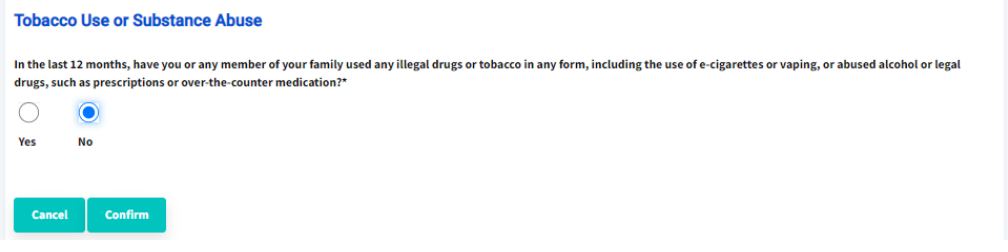
You will then see the Eligibility Questions. **Select each box to expand** and answer the applicable question. You must read each section verbatim including the question posed in that section.



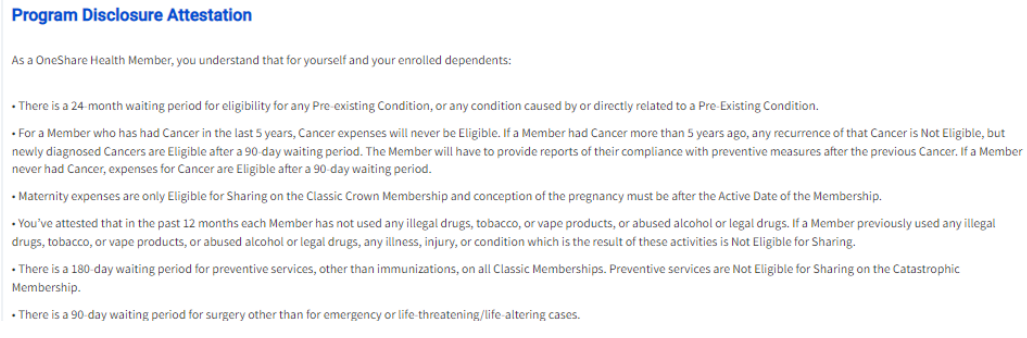
- Statement of Beliefs – If the Member answers “Yes,” select **Yes** and **Confirm** to continue.
  - If the Member answers “No” select **No.** You will not be able to continue until you select **Yes**.

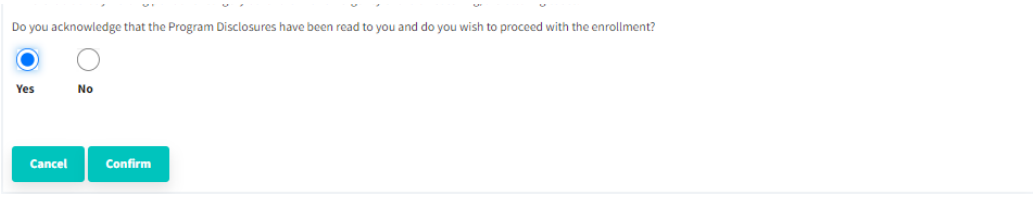


- Tobacco Use/Substance Abuse – If the Member answers "No," select **No** and **Confirm** to continue.
  - If the Member answers “Yes,” select **Yes.** You will not be able to continue until you select **No**.



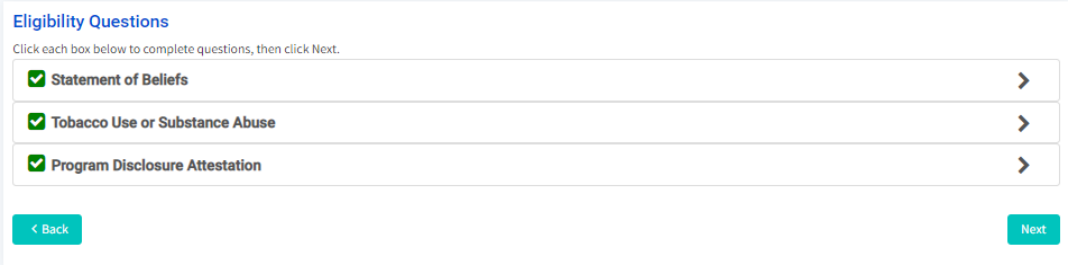
- Program Disclosure Attestation – If the Member wishes to proceed, click **Yes** and **Confirm**.
  - If the Member answers “No,” select **No.** You will not be able to continue until you select **Yes**.





Once all questions in each section have been answered, you will see the boxes are marked green.

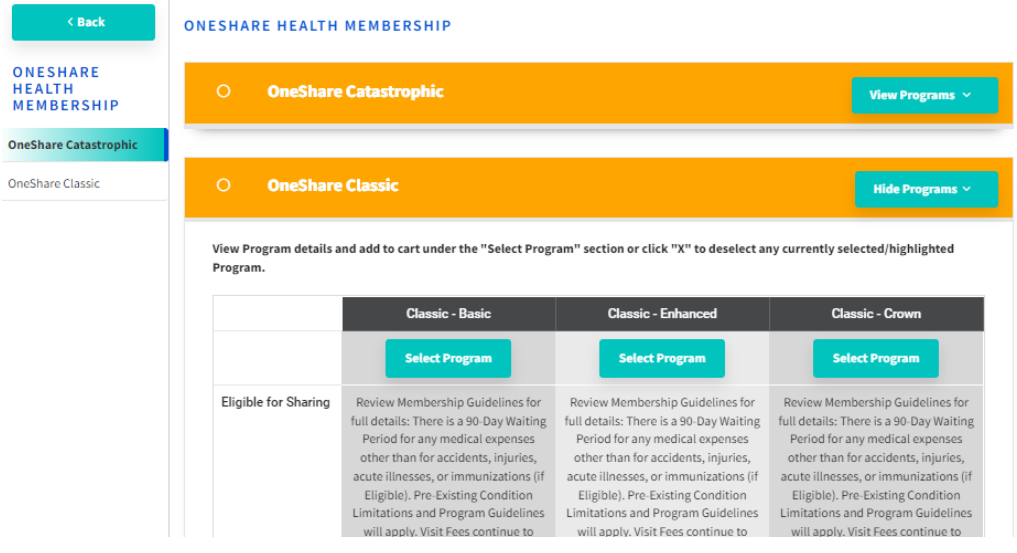
Select **Next**.



STEP 7

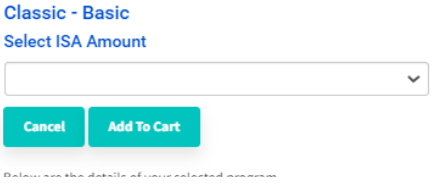
The OneShare Health Membership screen will now populate.

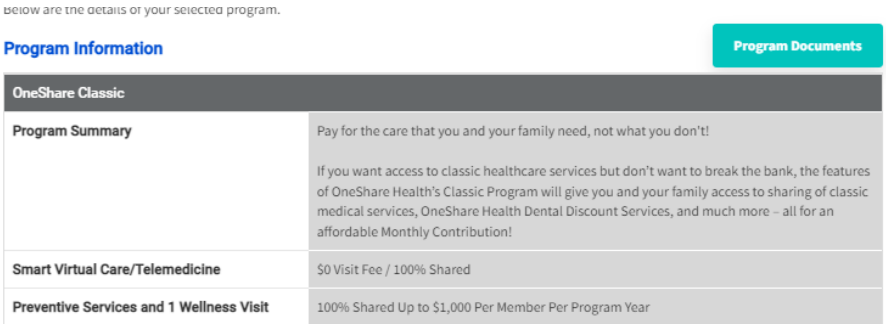
Select **View Programs** next to OneShare Catastrophic or OneShare Classic to review the features for each Program/Tier side-by-side and find the best option for your prospect.



To review a summary of eligible services, guidelines, and waiting periods on a certain tier, click the **Select Program** button.

You also have the option to download the applicable brochure or flyer by selecting the **Program Documents** button.

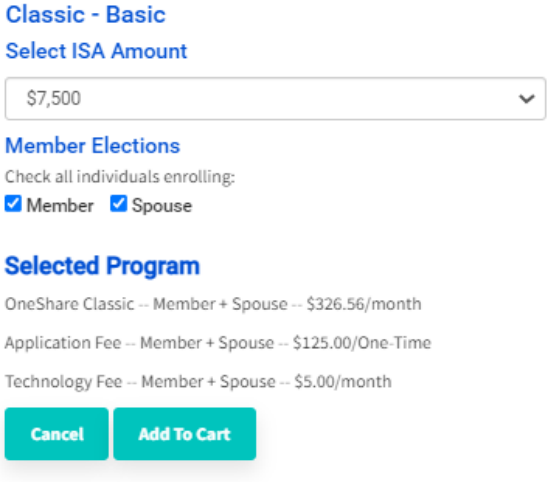




STEP 8

To view the Monthly Contribution for that tier, use the drop-down to **select the ISA**. Then, check the box(es) of the Members enrolling. Pricing will then appear.

To change the Program or Tier, select **Cancel** and repeat the steps above until the prospect is satisfied with the Program and Monthly Contribution Amount.



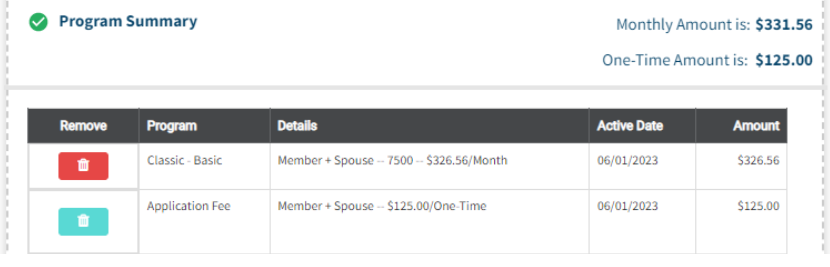
Review the one-time Application Fee of $125 and monthly Technology Fee of $5 *(allows real-time information to be uploaded)*.

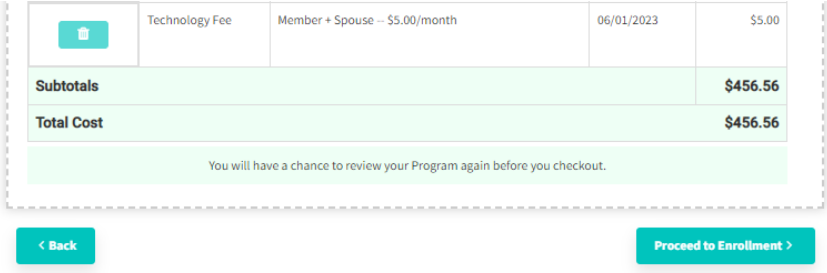
Once the prospect is satisfied, select **Add To Cart**.

STEP 9

The Program Summary will display in your cart including the fees discussed above.

Once you and/or the prospect are satisfied with the selections select **Proceed to Enrollment.**

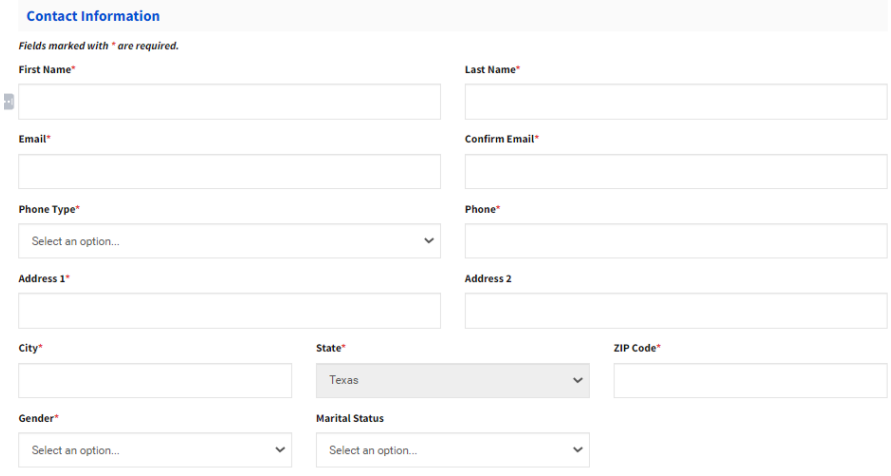




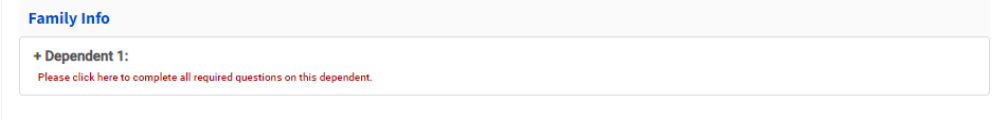
STEP 10

You will now see the Program Summary and Contact Information page.

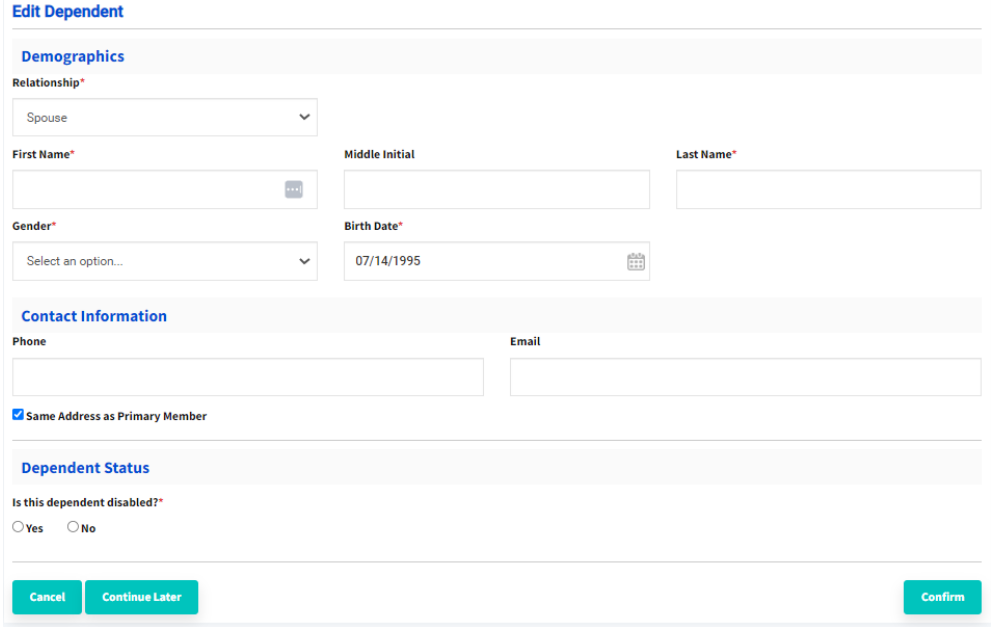
On the Contact Information section, **fill out** the information for the Primary Member.



If enrolling a Spouse or any other Dependents, **select the box under Family Info**.

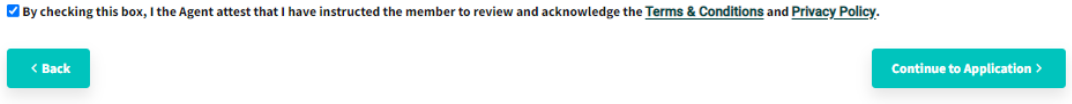


Complete the information in this section for the Spouse and/or Dependents. Then, select **Confirm**.



STEP 11

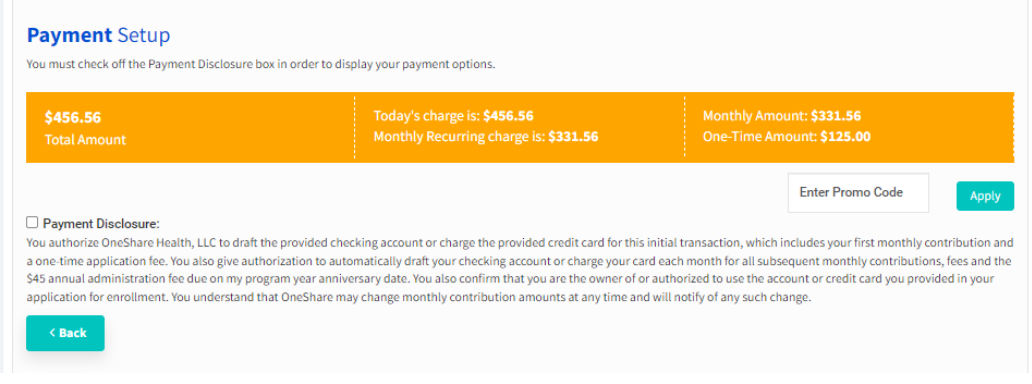
Check the box once you have instructed the member to review and acknowledge the Terms & Conditions and Privacy Policy.



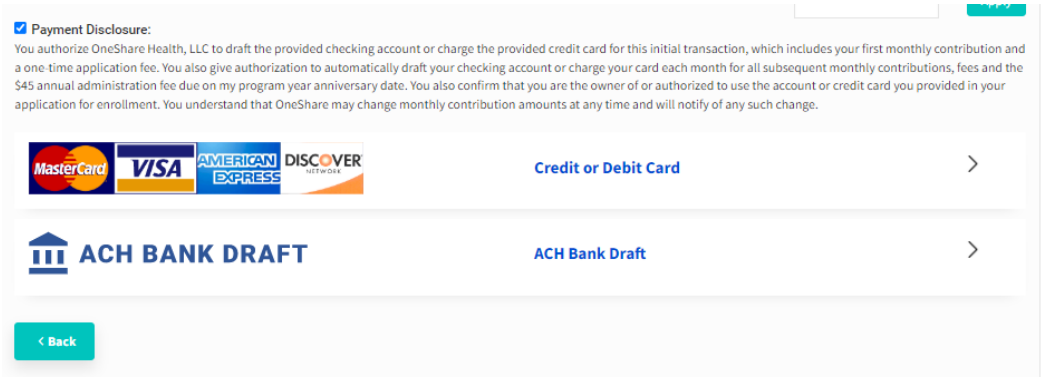
Then, select **Continue to Application**.

STEP 12

You will now see the Payment Setup screen. Advise the prospect of the **Payment Disclosure** and then check the box.



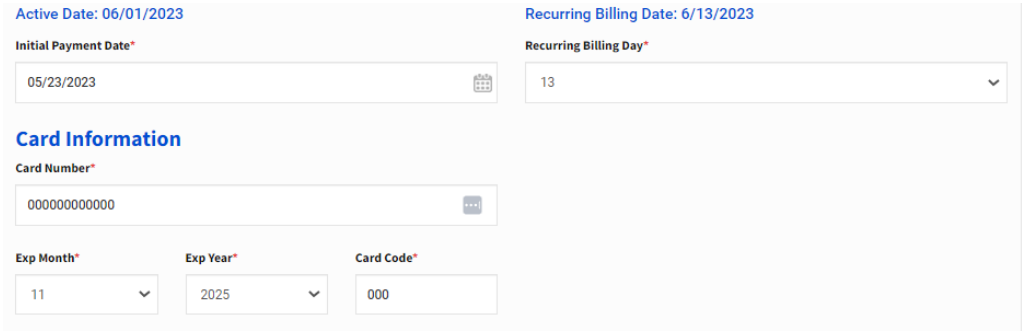
Next, select the applicable **form of payment**.



STEP 13

Next, you will choose the Member's **Initial Payment Date** and their preferred **Recurring Billing Day**.

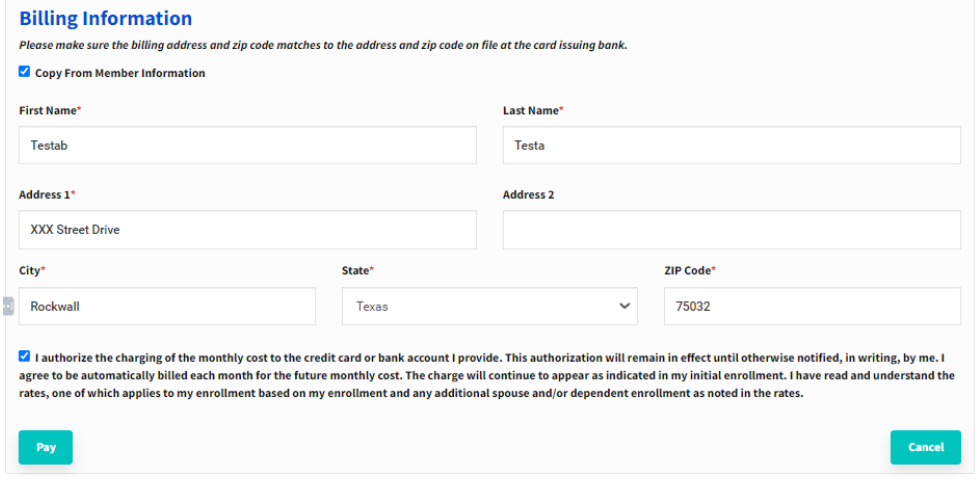
Then, **enter their banking information** depending on which form of payment was selected.



STEP 14

Fill in the Billing information if it is different from the Member's information. Otherwise, select **Copy From Member Information.**

Read the payment authorization script and then click on **Pay** to continue.

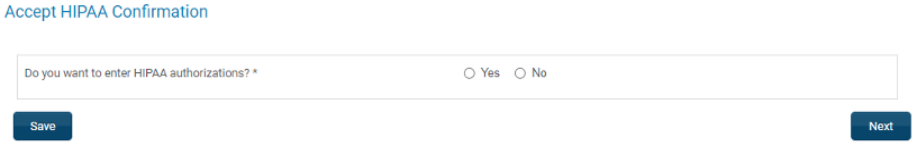


STEP 15

You will then be taken to the HIPAA Confirmation screen.

If the Member would like to provide HIPAA authorization to any individuals select **Yes**, and **Next** to continue.

- If the Member is not providing HIPAA authorization, click **No** and **Next** to continue. Skip to the next step.

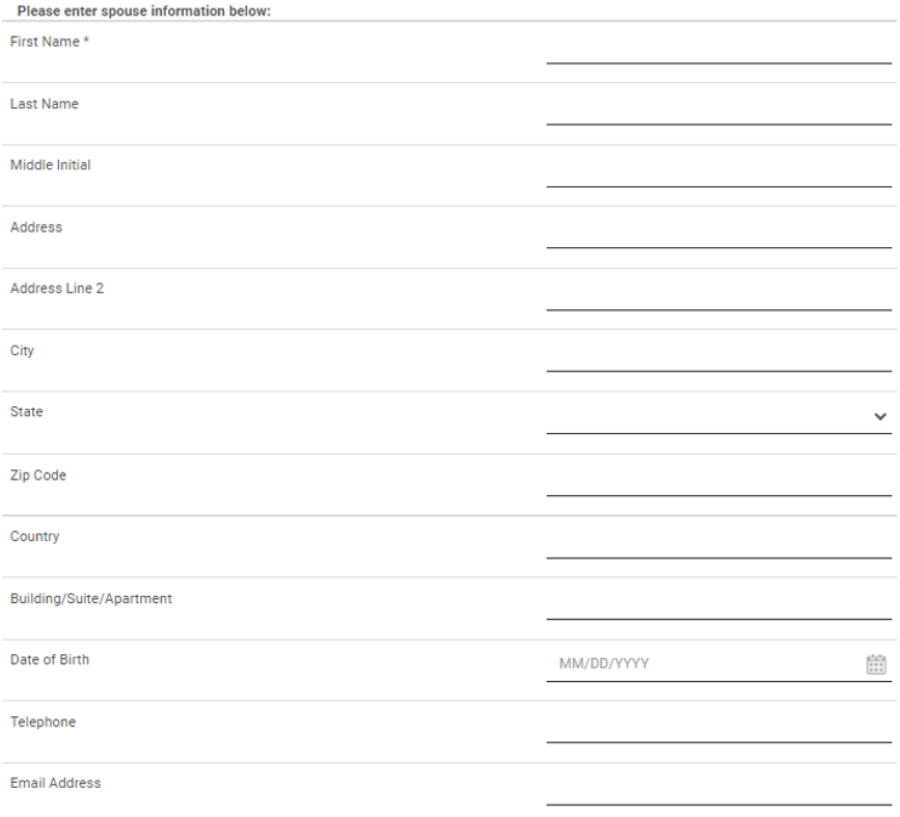


You will choose the authorization type (Broker, Spouse, or both).



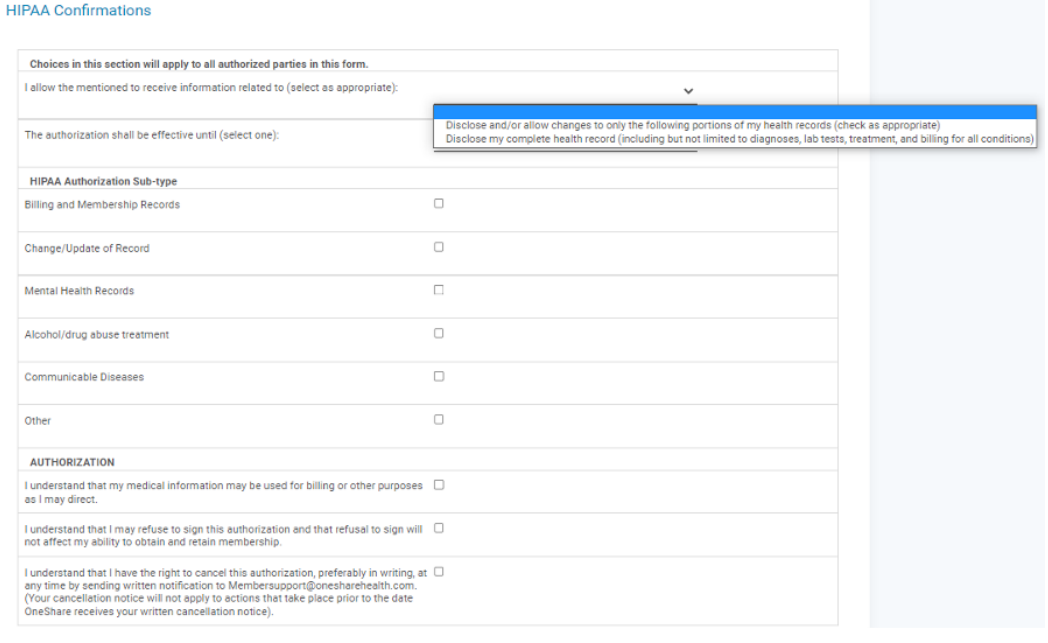


Fill out the individual's information. Click on **Next** to continue.



You will then choose the authorization type, Effective Date, and check off the authorization statements.

Click **Next** to continue.



Click **Next** to continue.

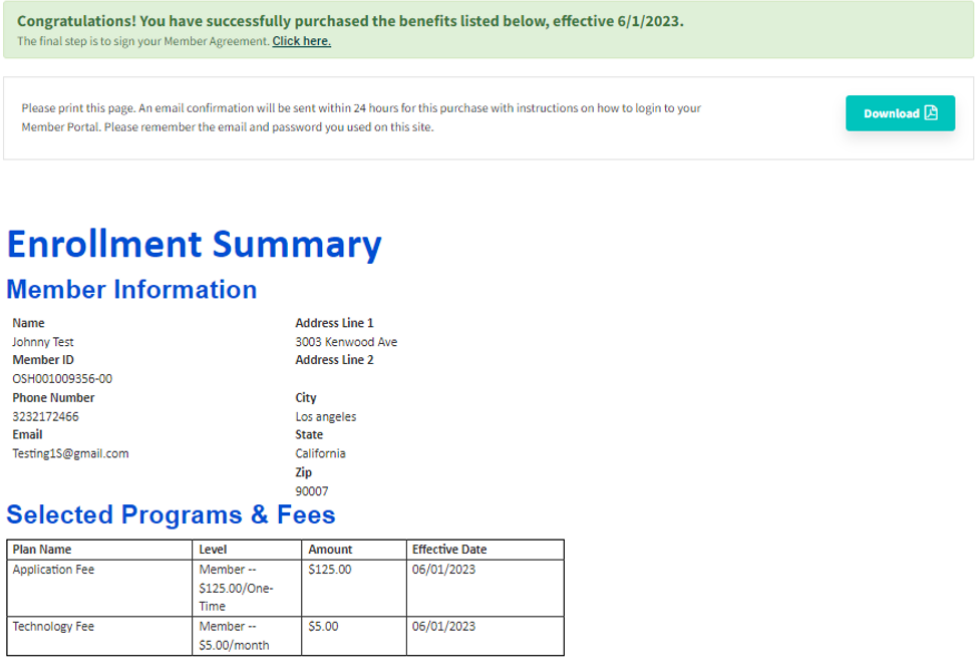


Next

STEP 16

You will now see the Enrollment Summary Screen.

Note: The application will be voided if the Member Agreement has NOT been signed 72 hours after Active Date via the Member Portal. *We highly recommend producers stay on the phone with the Member until this is completed.*



Signing of Member Agreement

1. The Member will receive the following emails: (1 of 2)



Program best tailored to your needs. Our goal is to uphold the highest standards of integrity and ethics to focus on your overall health and wellness.

To finish your enrollment, you must log in to the Member Portal and sign the Member Agreement PRIOR to your Active Date. You can access the Member Portal here: https://portal.onesharehealth.com/Logon/.

Member Name: Diego Lopez
Member ID: **001014802-00**

Member Name: Diego Lopez
Member ID: **001014802-00**

We encourage you to explore and familiarize yourself with the Member Portal, as it contains your Membership Guidelines and important information about your program. It is your responsibility to understand and abide by the terms of the Guidelines which include your program's Eligible/Not Eligible Services, Waiting Periods, Visit Fees, and Limitations.

You will find a digital copy of your Membership ID card in your Member Portal. The hard copy will arrive in the mail within 12-15 business days. If you have any questions, please contact Member Support at MemberSupport@OneShareHealth.com. Thank you for trusting us and we look forward to serving you!

Many Blessings,

The Team at OneShare Health

ONESHARE HEALTH, LLC (ONESHARE) IS NOT AN INSURANCE COMPANY BUT A RELIGIOUS HEALTH CARE SHARING MINISTRY (HCSM) THAT FACILITATES THE SHARING OF MEDICAL EXPENSES AMONG MEMBERS. As with all HCSMs under 26 USC § 5000A(d)(2)(B)(ii), OneShare's members are exempt from the ACA individual mandate. OneShare does not assume any legal risk or obligation for payment of member medical expenses. Neither OneShare nor its members guarantee or promise that medical bills will be paid or shared by the membership. Available nationwide, but please check www.onesharehealth.com/legal-notices for the most up to date state availability listing.

Email (2 of 2)

Program Enrollment Receipt - OneShare Health - Client

OneShare Health®

February 7, 2023

Hello Diego Lopez,

Thank you for enrolling in the OneShare Health Program. Attached is a receipt of your enrollment.

Sincerely,
Your OneShare Health Team
855-699-1274

OneShare Health, LLC is not an insurance company but a religious health care sharing ministry. For our full disclosures, see www.oneshare health.com/legal-notices for the most up to date state availability listing.



OneShare Health

Customer Service:
(855) 699-1274
MemberSupport@OneShareHealth.com
www.oneshare health.com
8am – 6pm CST/ Monday - Friday

PROGRAM SUMMARY

Member Information

First Name	**Address Line 1**
Diego	3718 Stafford Street
Last Name	**Address Line 2**
Lopez	N/A
Member ID	**City**
001014802	Irving
Phone Number	**State**
3232172466	Texas
Email	**Zip**
diego_lopez29@yahoo.com	75062

Programs

Charges will appear on your monthly bill as OneShare Health.

Your recurring monthly contribution will be charged for coverage for the following month.

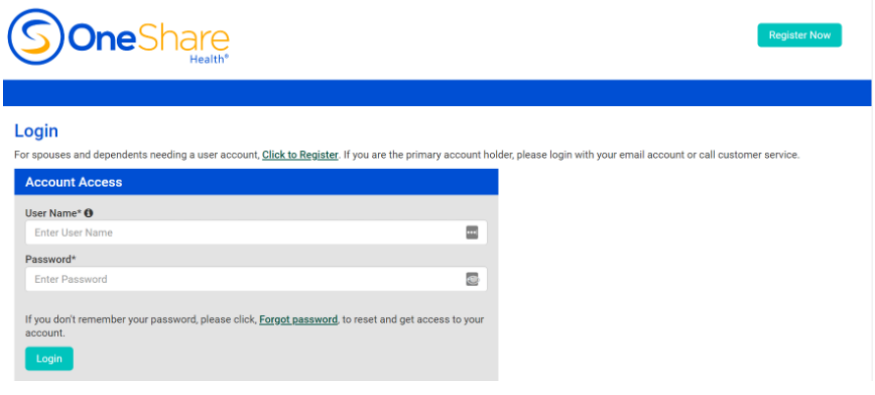
Program Name	Details	Amount	Active Date
Application Fee	Member – $125.00/One-Time	$125.00	02/28/2023
Classic - Basic	Member – $183.95/month	$183.95	02/28/2023
Technology Fee	Member – $5.00/month	$5.00	02/28/2023
Total Cost			$313.95

Charges to your credit card or bank statement will show as OneShare Health.
If you did not authorize this charge, please contact (855) 699-1274.

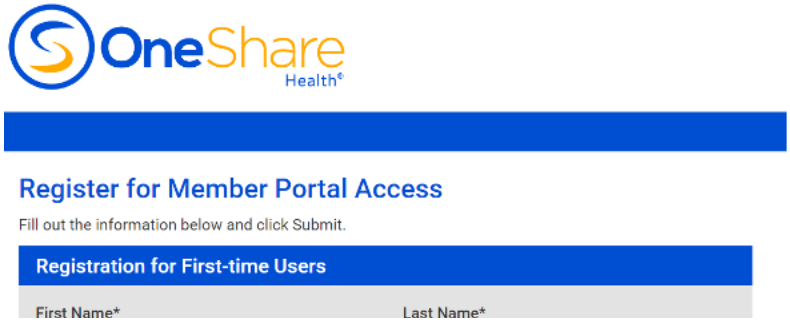
OneShare Health, LLC is not an insurance company but a religious health care sharing ministry. For our full disclosures, see www.oneshare health.com/legal-notices for the most up to date state availability listing.

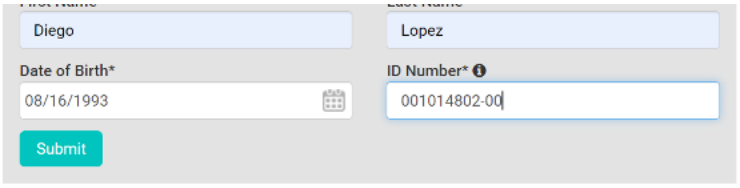
2. For the Member to complete the Enrollment process they must log into their Member Portal and sign the Member Agreement within 72 hours of their **Active Date.**

The Member will find the link to their Member Portal in the first email called Welcome to OneShare Health. Next, the Member must click **Register Now**.

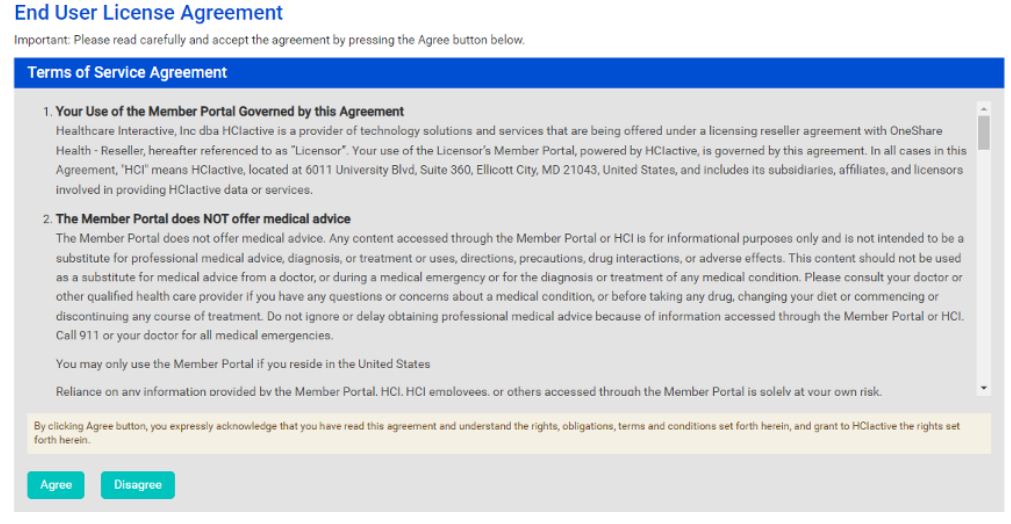


3. The Member will then complete their Registration for First-Time Users. Their Member ID number is included in the Welcome to OneShare Health email.

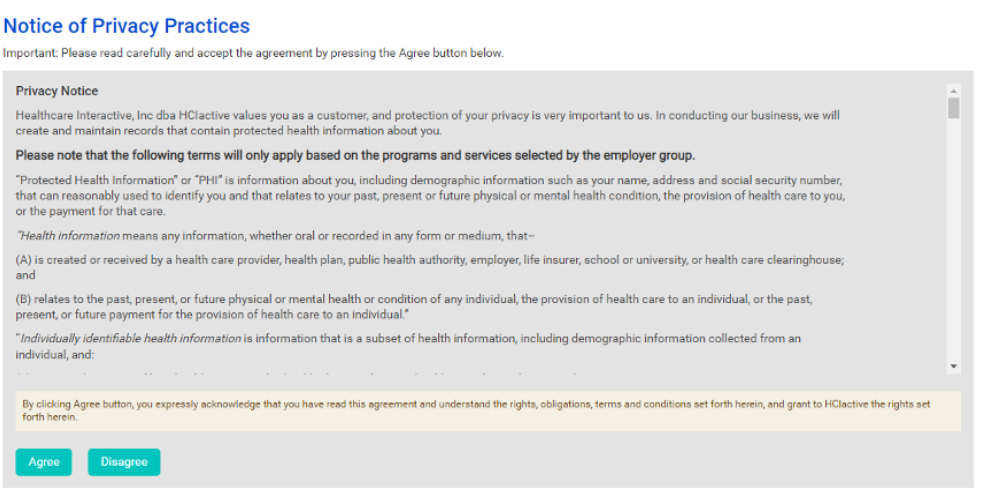




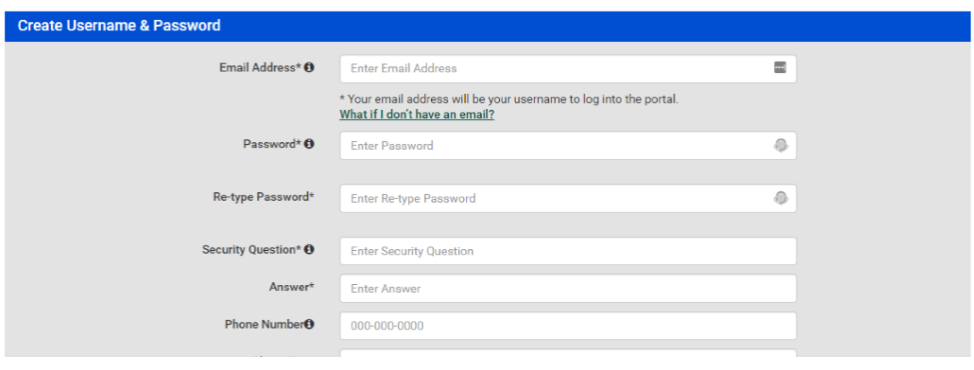
4. Once logged in, the Member must review the End User License Agreement and click **Agree**.

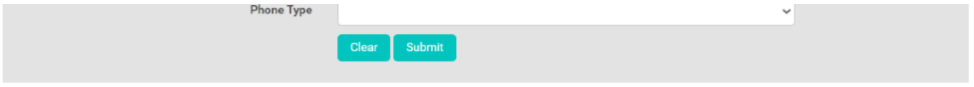


5. They must also review and agree to the Notice of Privacy Practices.

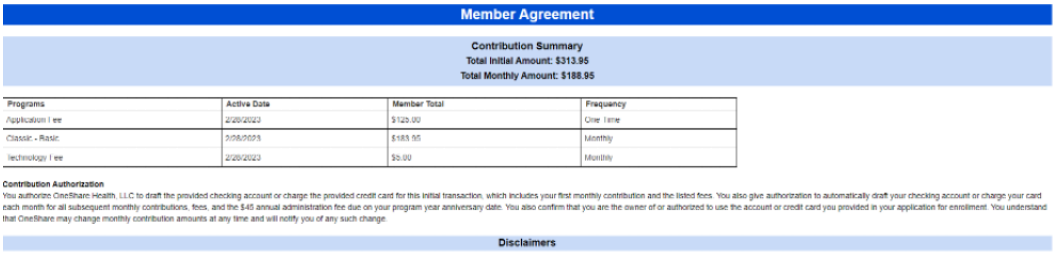


6. Finally, the Member will create their profile. Once completed, the Member will be able to see their Member Agreement.





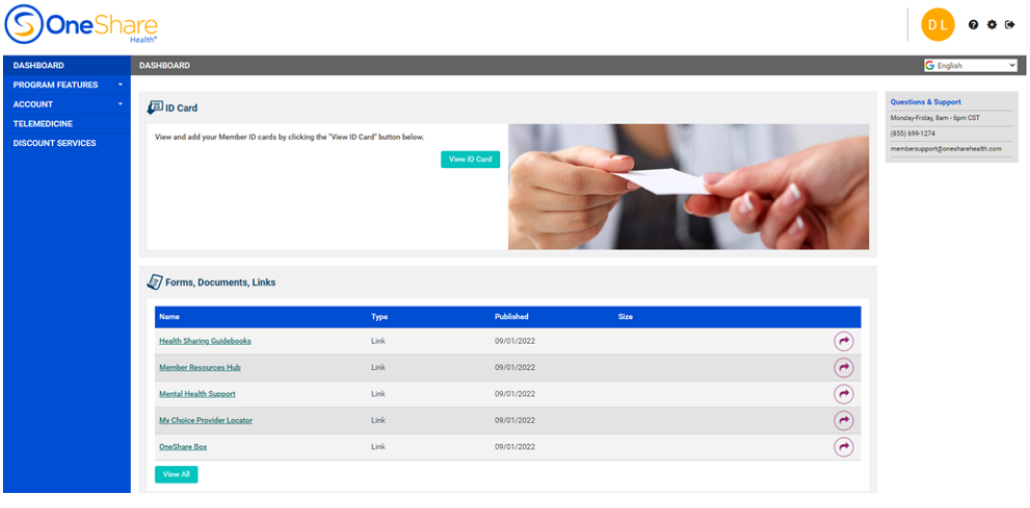
7. The Member will have to scroll to the end of the Member Agreement in order to sign.



8. Once the Member has signed, have them click on **Submit**.



9. After signing the Member Agreement, the Member will be able to view their Member Portal.

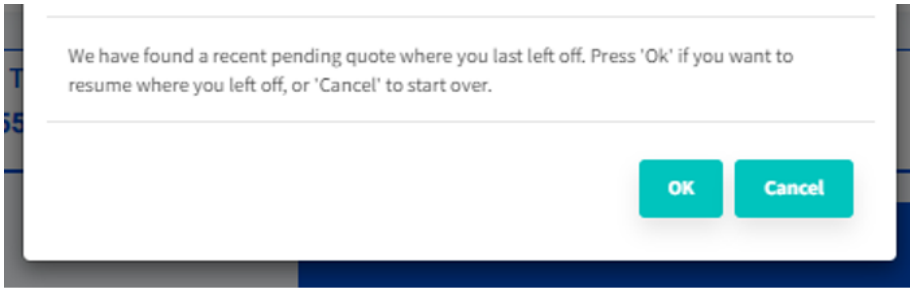


Saved Quotes

1. Finish enrollment after saving a quote.

- If a producer wants to return back to the quote, they must act as if they are starting a new quote with the SAME email address.
- A pop-up will appear "We have found a recent pending quote…"
- Click 'OK' to go back to the saved quote.

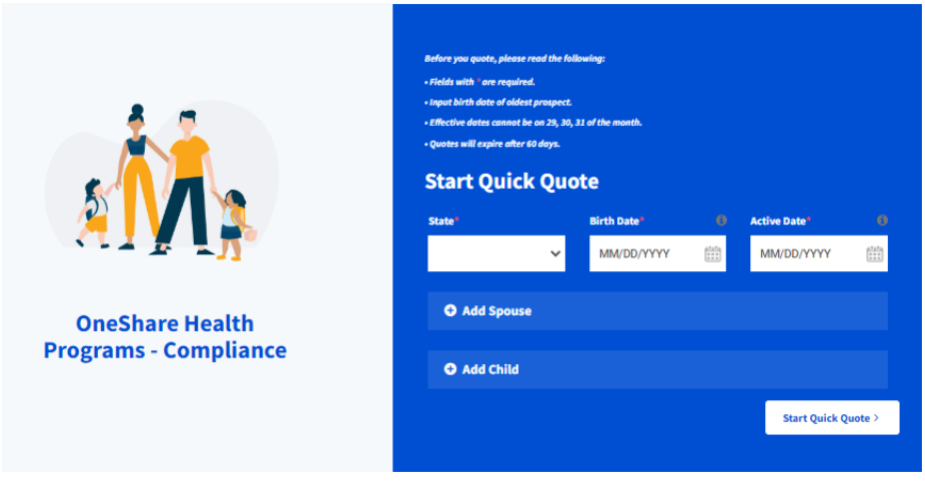




NOTE: If an application expires, you must notify OneShare Health to remove the email from the system.

2. Make a change to an existing quote.

- If you need to make a change to any of the fields within the blue box, you will need to **start a new quote.**



- A confirmation pop-up will appear letting the Producer know a quote already exists. Click **CANCEL** to void the original quote and create a new one.

