AgriPlan® BizPlan®

CLIENT ONLINE GUIDE

- for Universal Benefit Account® Web Portals -

This Online Guide provides comprehensive instructions to help you access and navigate our Universal Benefit Account® web portals to easily manage your AgriPlan or BizPlan from your own computer.

If at any time you have questions pertaining to the web portals or your plan, please call our Customer Care team at **800-422-4661** with your 12-digit TASC ID# on hand.

TABLE OF CONTENTS

OVERVIEW

TASC Universal Benefit Account® Web Portals for AgriPlan & BizPlan

TASC offers two secure web portals for your AgriPlan or BizPlan account: one is a CLIENT portal and the other is an EMPLOYEE portal. Both are part of our Universal Benefit Account system and each portal has its own login page and functionality.

Client Portal ubaclient.tasconline.com/	Employee Portal uba.tasconline.com/login
• Request a Transmittal Form • Request Year-End Report • View Plan Invoices	• Enter and view annual reimbursed expenses • Request a Transmittal Form • Request Year-End Report *(for clients only)* • View TASC Card transactions/expenses

This guide will walk through the various functions available to manage your account across both portals.

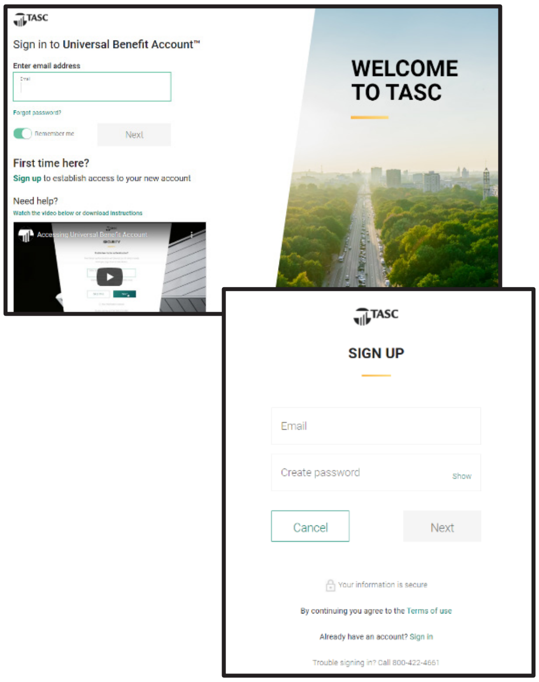
SIGN UP (CREATE ONLINE ACCOUNT)

To establish an online account via the UBA web portals, the user **must have a valid email address**.

Clients (business owners) should use the email address from their AgriPlan/BizPlan client contact profile as identified during the onboarding process. If not provided during enrollment, plan participants (self + employees) will need to use the email address entered in the Client Portal by the client (see details on page 5).

How to Create Your Online Account:

1. Open the portal login page (click on the link or type into web browser):
    a. Clients: ubaclient.tasconline.com/
    b. Employees: uba.tasconline.com/login
2. Under "First time here?" click on "**Sign up**" and follow the prompts to create your online account.
    a. If you are both a participant and a client, you only need to create one log in for both accounts.
    b. If you need help, watch the video tutorial found on the login page.
3. Enter your email address in the field.
4. Create a password using the following requirements:
    a. At least 8 characters
    b. At least one uppercase letter
    c. At least one lowercase letter
    d. At least one special character (!@#$%)
    e. At least one number
5. Click **Next**.
    a. For added security a six-digit code will be emailed to you.
    b. Go to your email, copy the code, and paste it into the Verify box.
    c. Click **Verify**.
6. Read the Terms of Use, click **Accept**.
7. Enter the last four digits of your social security number, click **Save**.
8. Check the information to make sure it's correct, if so click **Continue**.



Optional Additional Security

You can set up two-factor authorization by entering and verifying your mobile phone number. You can skip this process byclicking **Skip This.**

SIGN IN

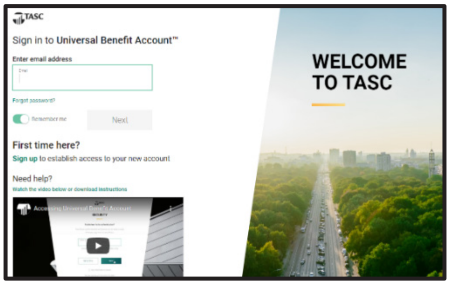
Clients can sign in to either the Client or Employee portal to perform various functions. The same client login credentials work for both portals as long as the email address in your client contact profile is the same as the email in your employee profile.

Once your online account is created, you can sign in to either portal from the login page below:

Client Portal: ubaclient.tasconline.com/
Employee Portal: uba.tasconline.com/login

We encourage you to bookmark or add these pages to your favorites for quick access.

How to Sign In:



1. Choose a portal based on your role and the functions you seek to perform and enter your login information.
2. Enter your account email address and click **Next**.
3. Enter your account password and click **Sign In**.
    a. If you forgot your password, click "forgot password" to reset.
4. If you have two-factor authorization activated, enter the code sent to your mobile phone in the indicated box and click **Sign In**.
5. Once you successfully log in, you will see your Overview page where you can navigate your account and perform tasks including preparation for year-end reporting.

Access login pages from TASC website:

You can also navigate to the portal login pages from the TASC website (www.tasconline.com), which may be helpful if you lose the direct links to those pages.

1. Go to www.tasconline.com and click on the green **LOG IN** button in the top menu bar.
2. **For Client Portal:** From the dropdown menu, select **PLAN SPONSOR/EMPLOYER** under Universal Benefit Account Login
3. **For Employee Portal:** From the dropdown menu, select **INDIVIDUAL/EMPLOYEE** under Universal Benefit Account Login
4. Follow steps 2-5 above to sign into each portal.

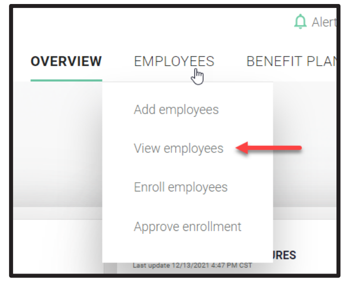
GIVE EMPLOYEES ACCESS

To make sure your employees can access the Employee Portal to enter their expenses and perform other online functions, **you must first enter a valid email address for each employee in the <u>Client</u> Portal**.

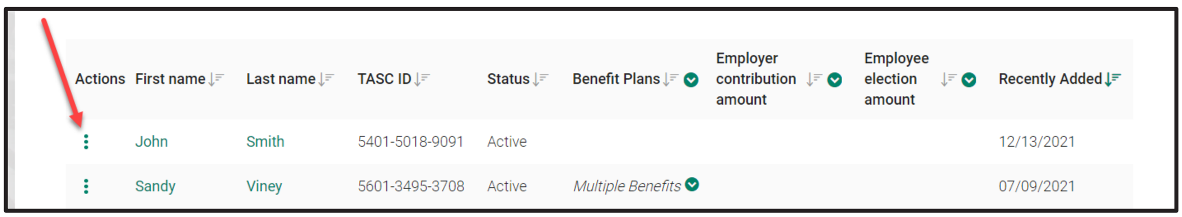
How to Enter Employee Emails in Client Portal:

Please follow these steps for each employee email address to be entered:

1. Log in to the Client Portal: ubaclient.tasconline.com/
2. From the Overview page, click "**Employees**" in the top navigation menu.
3. Select "**View employees**" from the dropdown.

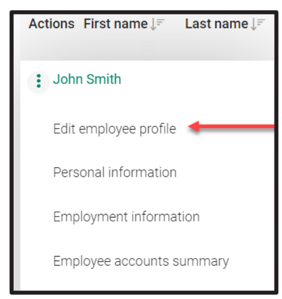


4. Click on the '**snowman dots**' left of the employee's name to display action items.

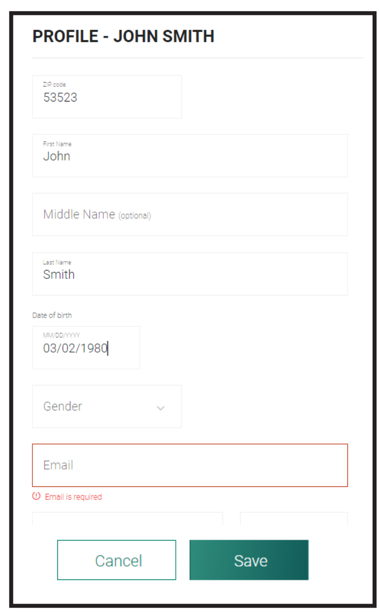


Actions	First name	Last name	TASC ID	Status	Benefit Plans	Employer contribution amount	Employee election amount	Recently Added
⋮	John	Smith	5401-5018-9091	Active				12/13/2021
⋮	Sandy	Viney	5601-3495-3708	Active	*Multiple Benefits*			07/09/2021

5. Click "**Edit employee profile**" to open their profile.



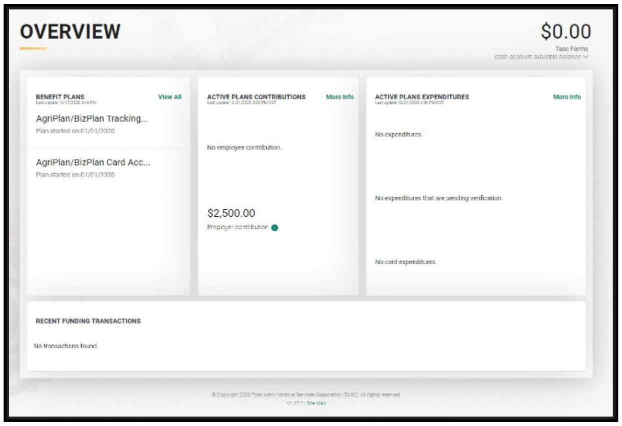
6. Type the employee's email address in the **Email** field.
7. Click the green "**Save**" button when done.



8. Instruct the employee (if not yourself) to go to the **Employee Portal** and **Sign Up (create an online account)** with the email address that was just entered for that employee in the Client Portal and create a password.
   a. Employee Portal: uba.tasconline.com/login
   b. Follow **SIGN UP** instructions on page 3.

NAVIGATING YOUR ONLINE ACCOUNT

Overview Dashboard



When you log in to your UBA Client portal, the **Overview** dashboard is where-you can view Self-help and Managing tools, Benefit Plan(s), YTD Contributions, TASC Card expenditures and recent Transactions for your card funding (if applicable).

Please note, with the TASC Card Account, you receive the Tracking Account which is used by employees to track expenses the business is reimbursing. This is either when the TASC Card is not used or not offered to employees.

Benefit Accounts:

1. AgriPlan/BizPlan TASC Card Account (unless you opted out)
   This account allows employees to present their TASC Card as payment for eligible medical expenses. With every swipe, TASC Card transactions are automatically visible and apply to your total year-end deductibles for reporting.
2. AgriPlan/BizPlan Tracking Account
   This account is where the employer can view reimbursed expenses that are manually entered by the employee via the Employee Portal.

Tools on Page:

- Self-help:
  - Alerts - Notifies you when items need your attention
  - Settings - View your business profile and add additional contacts as users.
  - Support -Track the progress of any Support Request you submit through Contact Us.
  - Contact Us – Your secure request to Customer Care for assistance, to send or request forms or locate our Customer Care phone and business hours.
- Managing Tools:
  - Employees - Access employee profiles, accounts, transactions, dependents and cards when applicable.
  - Benefit Plans – View plan summery, start and end date for spending, enrollment and funding set up.
  - Files - My Documents – Upload any administration materials such as your Client Administration Manual or forms you want to distribute to your employees. TASC will also load forms here occasionally. You will not be using our Data Files or templates.
  - **Transactions –** If applicable, here you will see funds collected from your business checking account to replenish the TASC card and pay TASC what fuds were fronted.
  - **Reports –** Currently, reports will not apply to your AgriPlan or BizPlan. Because TASC is not reimbursing your employees, the only transaction records would be TASC Card transactions. To view employee tracked expenses you will go to Employees >> View Employees and review individual employee transactions.

MANAGE YOUR BENEFIT PLAN

To access benefit plan information, click BENEFIT PLANS then View Plans using the top navigation menu. This will take you to the landing page.

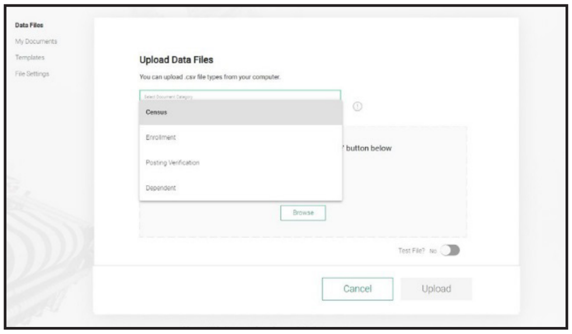
Click the snowman menu to the left of each benefit plan to access the plan's summary, enrollment information, coverage period, and funding method.

How to Remove Employees

You can remove employees from the system by completing a Plan Change form and uploading it to an online Support Request.

My Documents

Select "My Documents" options on the left side of your screen to upload documents, such as your employee handbook, HR policies, employee records and more. TASC will also upload common documents and guides to your page.



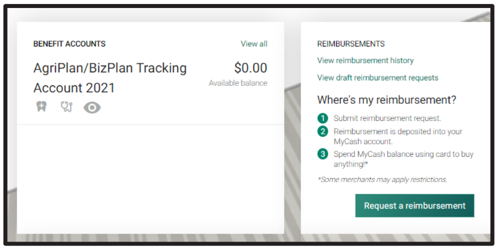
ENTERING/TRACKING EXPENSES (in Employee Portal)

Employees can conveniently and easily enter their **previously reimbursed** out-of-pocket expenses online under the AgriPlan/BizPlan Tracking Account in the Employee Portal at any time during the year to track annual expenditures, instead of completing and returning their paper Transmittal form.

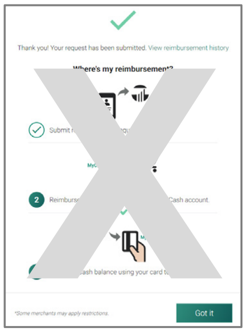
IMPORTANT: Expenses may only be entered and tracked through the Employee Portal. Expenses cannot be tracked in the Client Portal.

How to Enter Expenses in Employee Portal:

Repeat these steps for each expense to be entered:



1. Log in to the Employee Portal: uba.tasconline.com/login
2. From the Overview page, select the green button to "Request a reimbursement."
   Please note: Despite the label, this function will not initiate or result in a reimbursement. This function is setup to only track expenses for AgriPlan/BizPlan.
3. Always select the employee name as who incurred the expense since the business reimburses the employee, not the family members.
4. Select the date the expense was incurred.
5. Enter the expense type from the appropriate dropdown.
6. Enter the expense details (dollar amount, provider/merchant, and who incurred the expense), and attach verification (*optional*).
7. Click **Next**.
8. Review your request; edit info or click **Submit** to save your expense information.
9. A "Thank You" screen appears to confirm your submittal. Please disregard the "Where's my reimbursement" info on this page, as it does not apply to your expense tracking.
10. Click the "Got it" button to close the screen and return to your Overview page.
11. Repeat steps 3-10 for each expense you need to enter.



To VIEW your manually entered expenses: go to Transactions in top menu bar and select "Expenditures" from the drop-down menu.

To VIEW TASC Card expenses: From the Expenditures page, click on the benefit account dropdown and select the box for "AgriPlan BizPlan Card Account" and click Apply.

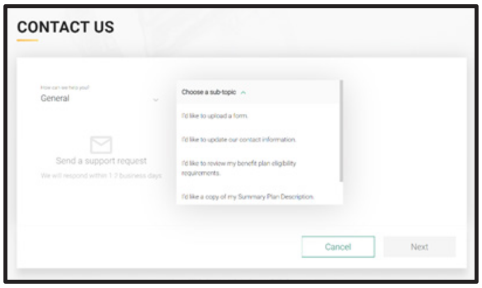
REQUEST A YEAR-END REPORT

via online Support Request in either portal

Clients may request a Year-End Report online via the Client or Employee Portals. While getting a year-end report is optional, it is a good idea because it allows TASC to protect you with our Audit Guarantee.

Before you begin, you must verify that all employees have submitted their annual expenses, either online or via Transmittal form. A Year-End Report cannot be generated until this step is complete. You may have to reach out to your employees to verify they are done entering expenses for the year.

How to Request your Year-End Report:



1. Log in to the **Client Portal** or **Employee Portal**
2. Go to “Contact Us” (top right of page)
3. Click on “Choose a topic” and select “General” (Client Portal) or “General Assistance” (Employee Portal) from dropdown
4. Click on sub-topic and select from dropdown menu: “**I’d like to request an AgriPlan/BizPlan Year-End Report**”
5. Click on “Send a support request” (turns green)
6. Click **Next**.

If you’re in the Client Portal:	Next to “Are you requesting on behalf of an employee” (even if you are) select “**No**”
	For “Regarding a benefit account” (all plans selected in dropdown) select “**Yes**”
	Under the Description box:
If you’re in the Employee Portal:	Indicate if you wish to have the Year-End Report **emailed or mailed** to you. If a copy needs to be mailed to a different email (accountant or tax preparer), please specify.
	For “You or a dependent” select “**Myself**”
	For “Regarding a benefit account” (all plans selected in dropdown) select “**Yes**”

7. Click the “**Submit**” button

Your **Year-End Report** will be sent to you within <u>10</u> business days via mail, or within <u>48 hours</u> via email (depending on the method you indicate in your request). Please note, these times may be extended due to manual auditing needs.

REQUEST A TRANSMITTAL FORM

via online Support Request in either portal

Clients and employees may request a copy of their Transmittal form via the online portals to use for tracking and submitting annual expenses. Keep in mind, you do not need a Transmittal form if you choose to submit your expenses online -- the faster and easier method!

NOTE: Employees must enter their own expenses via their online account; the client cannot enter in reimbursed expenses on their behalf in the client portal.

How to Request a Transmittal Form:

1. Log in to the **Client Portal** or **Employee Portal**
2. Go to "Contact Us" (top right of page)
3. Click on "Choose a topic" and select "General" (Client Portal) or "General Assistance" (Employee Portal) from dropdown
4. Click on sub-topic and select from dropdown menu:
"I'd like to request an AgriPlan/BizPlan Transmittal Form"
5. Click on "Send a support request" (turns green)
6. Click **Next**.

If you're in the Client Portal:	For "Are you requesting on behalf of an employee" (even if you are) select "**No**
	For "Regarding a benefit account" (all plans selected in dropdown) select "**Yes**"
	Under the Description box: • List the **names of all employees** you need a Transmittal for, including yourself (these forms are personalized, so the employee names are important). • Indicate if you wish to have the Transmittal Form(s) **emailed or mailed** to you.
If you're in the Employee Portal:	For "You or a dependent" select "**Myself**"
	For "Regarding a benefit account" (all plans selected in dropdown) select "**Yes**"
	Under the Description box: Indicate if you wish to have the Transmittal Form emailed or mailed to you.

7. Click the "**Submit**" button.

The Transmittal form(s) will be sent to you within 7 business days via mail, or within 48 hours via email (depending on which method you indicate in your request).

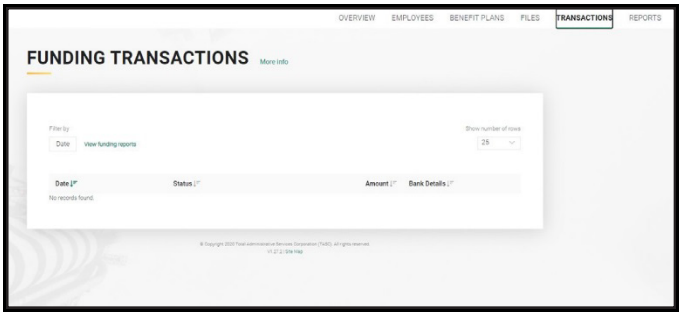
NOTE: If you cannot get online, you can also call Customer Care at (800) 422-4661 to request a Transmittal be sent (email or mail).

VIEW TRANSACTIONS (in Client Portal)

Click on TRANSACTIONS and choose from the following drop-down options: funding transactions, billing transactions, invoices, payment, and credit memos.

Funding Transactions

- You can check all funding transactions, filtering by date, funding source or status.
- You can see dates, funding source, funding type, status, amount, bank details, and transaction summary and details.



Billing Transactions (you will be redirected NetSuite)

- You can track all your billing transactions with TASC including payments, invoices and credit memos.
- You can filter your results by type and status

Invoices (you will be redirected NetSuite)

When you click on INVOICES you will be taken to Net Suite where you will need to login to access your invoices.

Payments (you will be redirected NetSuite)

When you click on PAYMENTS you will be taken to Net Suite where you will need to login to access your payments.

Credit Memo (you will be redirected NetSuite)

- Track your invoices, including status, customer, date, amount paid, and items.
- Track your payments, payment status, payment method on this page.
- Track your Credit Memos.

ACCESS REPORTS

Enrollment/Funding /Request Payment Details

You can access a variety of the reports on this page. Filter your results by Report Type, Time-Period, Benefit Plans and Divisions to locate the desired report quickly. Once located, you can download any of the reports as either a PDF or CSV file with contributions, within IRS limits, for the plan year.

ACCOUNT SETTINGS

Under the Settings tab you manage and make edits to the specifics regarding your account. This includes your Profile, Manage Users, and Sign-In and Security.

Profile Management

By clicking on **Profile,** you can view your TASC ID number, EIN, Client Name, Federal Filing Status, and your Primary, Billing and Shipping Addresses. Make sure all this information is correct and current. Call or submit a Support Request to make changes to your profile.

Users Access Roles

We understand that kind of across-the-board access may not be the best fit for everyone, however. You might have someone in your office whose job is to handle invoices, or you may work with an external vendor who approves your enrollments. We've created eight user roles that let you define the level of flexibility you need for your team. To assign users access role, click on Setting at the top of your screen, and then click on **Manage User**.

On the next page, click on **Setup User Access** in the green box. On the next the page to manage your user click on **Add New User**, using the search function to locate additional users.

Once you have added users, you can assign access roles. The choices are listed below. To select the option, just select a user, click on the appropriate role and click on Save. Continue this process until you have assigned all the user roles you want.

- **Administrator**—All Universal Benefit Account functionality. There must be at least one administrator for your account – typically you, the primary contact.
- **Benefit Plan Manager**—All functionality except billing. Users in this role can access everything an administratorcan, with the exception of billing transactions and NetSuite. Only the benefit plan manager and the administrator can add or update user access.
- **Employee Manager**—Add and enroll employees. Can also approve enrollments, upload documents and view reports.
- **File Specialist**—Download templates and upload data files. All other users come to the overview upon signing in, but the file specialist only sees the download and upload screens, making this highly specialized role ideallysuited for outside vendors who manage your files.
- **Financial Manager**—View financial transactions. This includes posting verification and summaries. Can also request new reports.
- **Billing Manager**—View billing transactions. This includes access to NetSuite.
- **Reports Manager**—View reports. Can also request new ones.
- **Reviewer**—View everything. View-only access to all areas of the client experience, except for billing transactions and NetSuite.

Some functions remain open to everyone. All users can:

- Manage their own Universal Benefit Account access (two-factor authentication, password changes, etc.)
- Find support online (submit a support request and view documentation, videos & FAQs)
- Receive alerts

And all contacts can continue to call our Customer Care team – but it's important to note that their designated role will tell us what kind of information we should be sharing with them. Just as with the online experience, users will receive support appropriate to their level of access.

ACCOUNT SETTINGS *- continued*

Bank Accounts

Click on BANK ACCOUNTS to view a list of your bank accounts for invoices and TASC Card transactions.

Sign in & Security

Lastly, click on SIGN & SECURITY to control your sign-access and two-factor authentication. Two factor authentication will prompt you to enter a code every time you sign in. Why? With your sign-in, you have access to employee's Personally Identifiable Information (PII) and Protected Health Information (PHI). To help ensure the security of that information, two-factor authentication is required. Click on either CHANGE PASSWORD or CHANGE PHONE NUMBER to edit.

CONTACT US & SUPPORT

CONTACT US

Select the CONTACT US tab to access the multiple ways for contacting TASC for assistance. On the Contact Us page you can choose the topic and sub-topic drop down menus. We will then display the best ways for you to contact us, which includes an **ONLINE SUPPORT REQUEST**.

SUPPORT

Click on SUPPORT in either web portal to track your online support requests.

RESOURCE WEBSITE

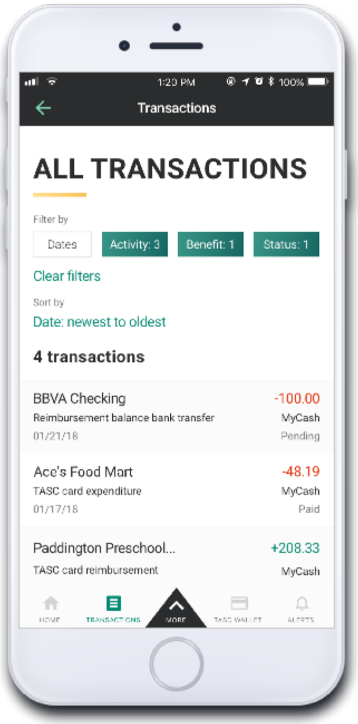
Please visit our AgriPlan/BizPlan resource page (linked above) to easily access helpful materials to support your plan. This web page does not require authentication/login.

AgriPlan/BizPlan Resource Website

https://www.tasconline.com/UBA_Upgrade/AgriPlan-BizPlan_upgrade/

- **Quick Start Guide** (for one-employee plans): outlines the first important steps to get you started.
- **Client Administration Manual**: a complete guide with everything you need to know about your AgriPlan or BizPlan benefits. Available for one-employee and multi-employee plans.
- **Client Online Guide:** a complete guide with detailed instructions on how to navigate the UBA web portals and perform important functions.
- **Instructional/Demo Videos:** shorter snippets of instructions that walk you through the process for performing some common functions online.
- **Participant Education Flyers:** individual flyers you can share with employees to educate them on available plan features (i.e., TASC Card, mobile app, eligible expenses).

TASC MOBILE APP



TASC MOBILE APP FOR YOUR EMPLOYEES

The TASC Mobile app is a fast and accessible account management tool for your participant's accounts! With TASC Mobile app, your participants are now able to securely access their account(s) balances from anywhere at any time using their mobile device.

TASC Mobile App Features:

- Use the Request for Reimbursement function to enter/track previously reimbursed expenses. This function does not trigger a reimbursement.
- Upload pictures of receipts with phone camera.
- Access TASC Wallet to manage and store your TASC Card and other important documents.