



AgriPlan® BizPlan®

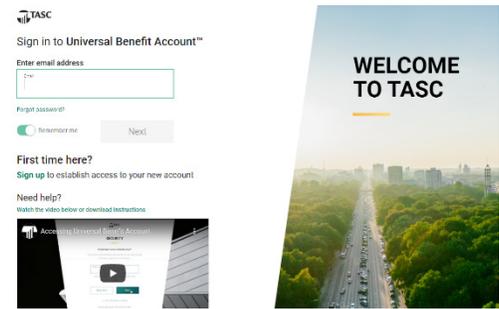
How to Enter Participant Emails in UBA Portal - Universal Benefit Account® -

The new UBA platform offers two secure web portals: a Client Portal and an Employee Portal. To make sure the participants (employees) in your AgriPlan/BizPlan can access the Employee Portal to enter expenses and perform other online functions, you **must** enter a valid email address for each participant in the Client Portal.

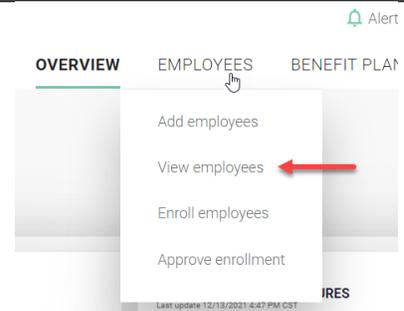
Please follow the instructions below to enter participant email addresses in the Client Portal.

Client Instructions

1. Log in to the UBA [Client Portal \(ubaclient.tasconline.com/\)](http://ubaclient.tasconline.com/):
 - a. Use your same login credentials for the UBA Client Portal (email address & password)
 - b. If it's your first time logging in to the UBA portal, click "Sign up" under "First time here?" and follow the prompts to establish your online account.
 - c. If you have trouble logging in, watch the video tutorial found on the log in page.
 - d. If you forgot your password, click "forgot password" to reset.



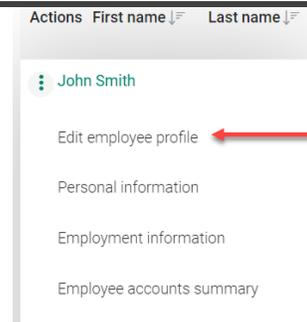
2. From the Overview page, click "Employees" in the top navigation menu.
3. Select "View employees" from the dropdown.



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

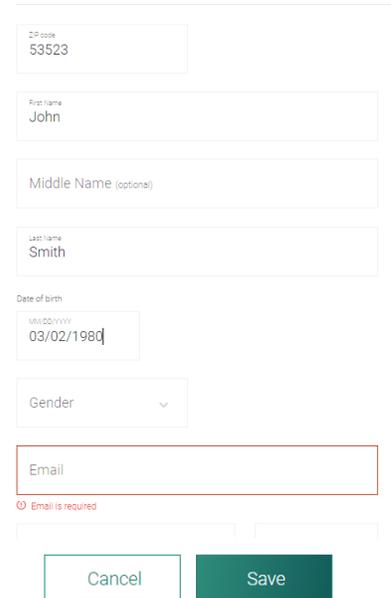
5. Click **“Edit employee profile”** to open their profile.



6. Type the employee’s email address in the **Email** field.

7. Click the green **“Save”** button when done.

PROFILE - JOHN SMITH



8. Instruct the employee/participant (if not yourself) to go to the [Employee Portal](#) and **Sign Up** with the email address that was just entered for that employee in the Client Portal, and create a password.

uba.tasconline.com/login