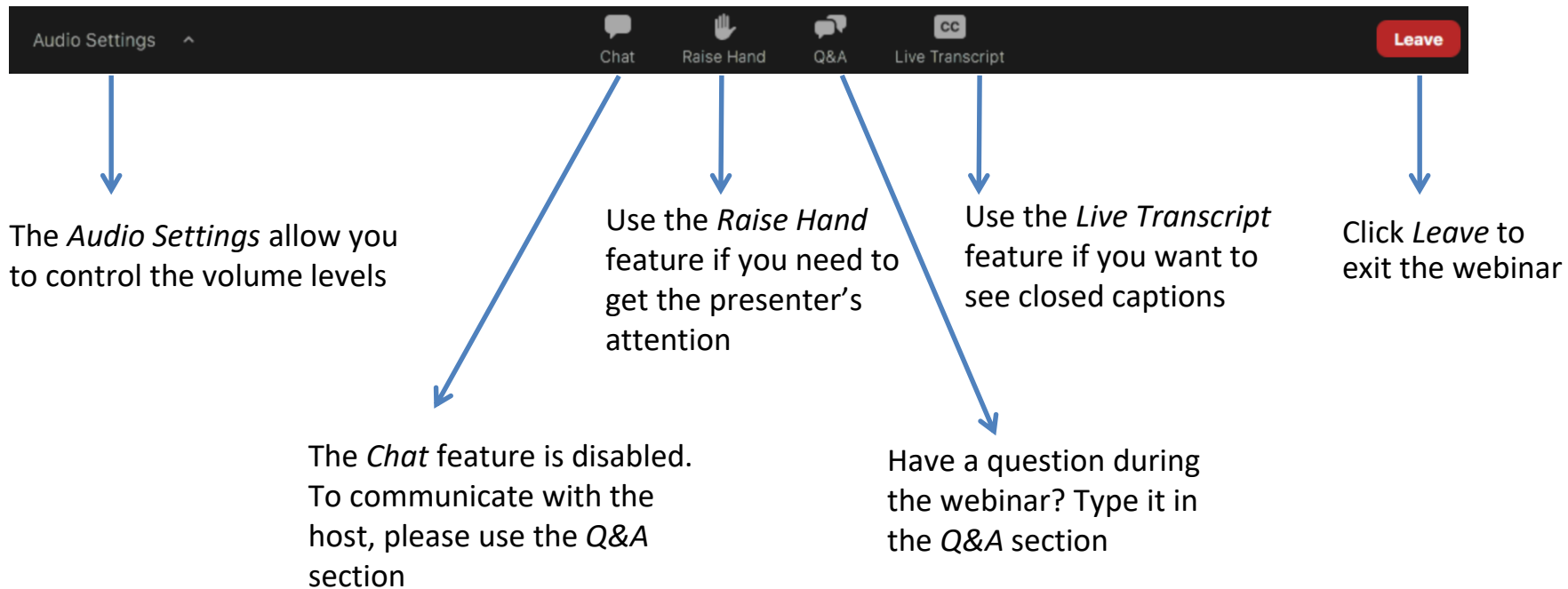




# Working with the U.Plan for College Administrators

May 20<sup>th</sup>, 2021

# How to Participate in This Webinar



# Agenda

## Overview of U.Plan Transition Online

- College Administrator Access
- Website to Log In
- Live Demo of Site
- EFT Instructions

Questions

## U. Plan Transition- Why the Move Online

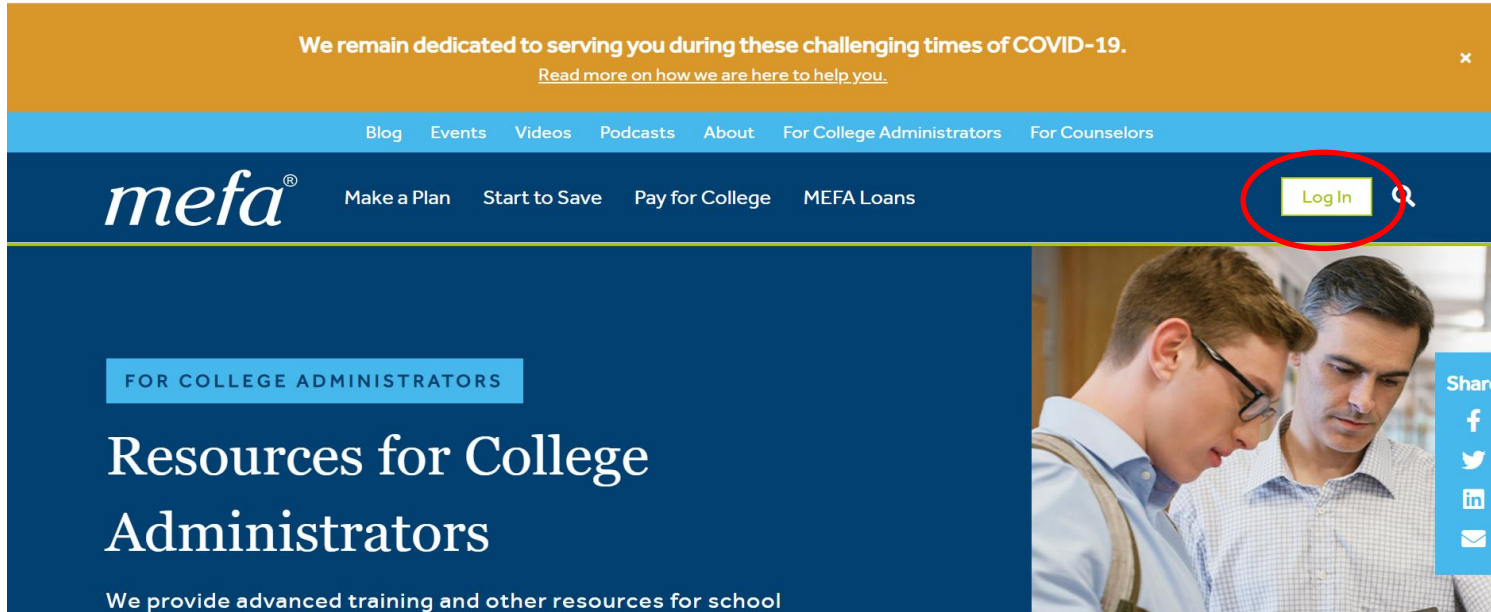
### **For Families:**

- Access to Year Round Savings
- Ability to Automate Savings, Check Account Balances and Request Disbursements More Quickly
- Streamlined Process Overall

### **For College Admins**

- Ability to Access Rosters
- Set-Up EFT to Receive Funds (optional, not required)
- Quicker Access to Information

# Website to log into the UPLAN



We remain dedicated to serving you during these challenging times of COVID-19.  
[Read more on how we are here to help you.](#)

Blog Events Videos Podcasts About For College Administrators For Counselors

*mefa*<sup>®</sup> Make a Plan Start to Save Pay for College MEFA Loans **Log In**

FOR COLLEGE ADMINISTRATORS


## Resources for College Administrators

We provide advanced training and other resources for school

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# Website to log into UPLAN

Blog Events Videos Podcasts About For College Administrators For Counselors

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Apply for a loan, finish your saved application or become a co-borrower

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View your online U.Plan Prepaid Tuition Program account information

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**UFUND**<sup>®</sup>

View your online MEFA U.Fund College Investing Plan account information

[Log In](#)

**attainable**<sup>SM</sup>





View your online account

**mefa**<sup>®</sup>  
**pathway** YOUR PLAN FOR THE FUTURE<sup>®</sup>

View your account information

Repay Your MEFA Loan

College Administrators

Share    



# U.Plan Landing Page



Welcome to the U.Plan Prepaid Tuition Program. We look forward to helping you save for college. Please note that you must use one of the following supported desktop browsers to create an online U.Plan account:

- **Google Chrome – two latest versions**
- **Internet Explorer 11**
- **Microsoft Edge**
- **Safari for Mac – two latest versions**

Please contact us with any questions or concerns at (800) 449-MEFA (6332) or [collegeplanning@mefa.org](mailto:collegeplanning@mefa.org)

Sign in

[Forgot User ID](#)

Enter your User ID

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[Forgot Password](#)

Enter your password

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Remember my User ID

# EFT Instructions

Provide to [cniles@mefa.org](mailto:cniles@mefa.org) on school letterhead

Bank Name

Bank Contact

Bank Telephone Number

Bank Account #

ABA Routing #

Contact at school to confirm bank information (other than person who signs letter)



Questions?  
Thank you!

Contact Information:

- Jonathan Hughes @ [jhughes@mefa.org](mailto:jhughes@mefa.org)
- Claudia Niles @ [cniles@mefa.org](mailto:cniles@mefa.org)
- Web: <https://www.mefa.org/college-admins/>