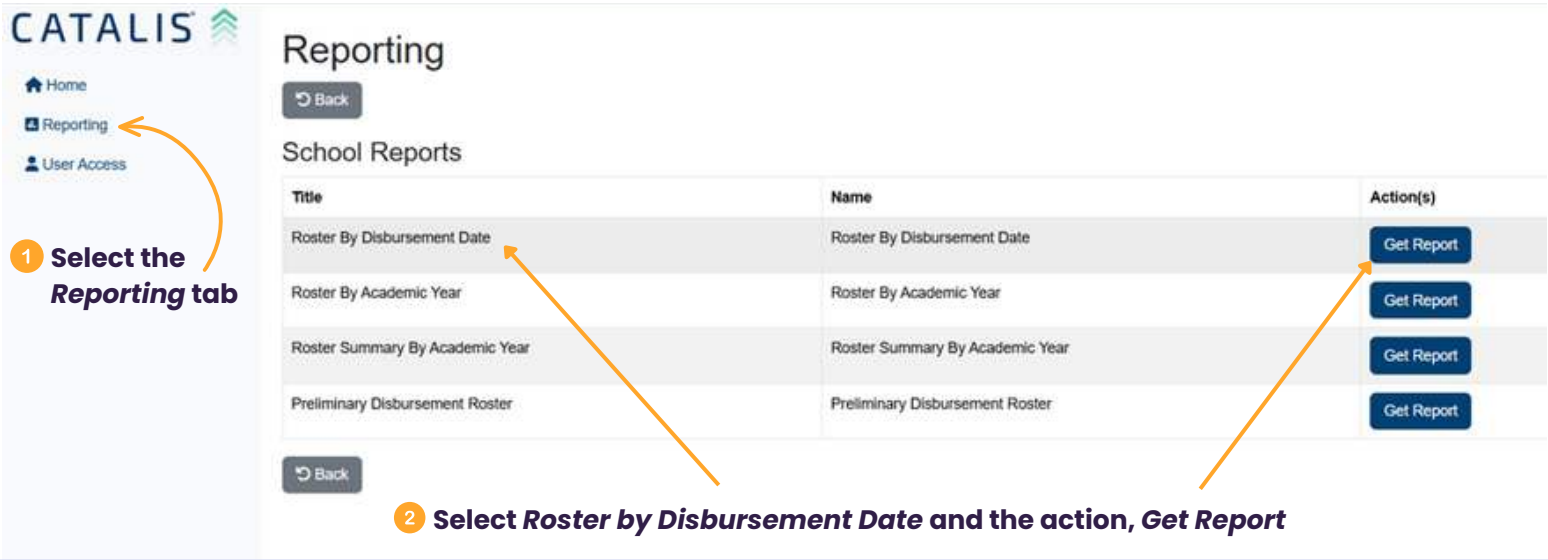
MEFA uplan™
PREPAID TUITION PROGRAM

How to Access Your U.Plan Distribution Roster

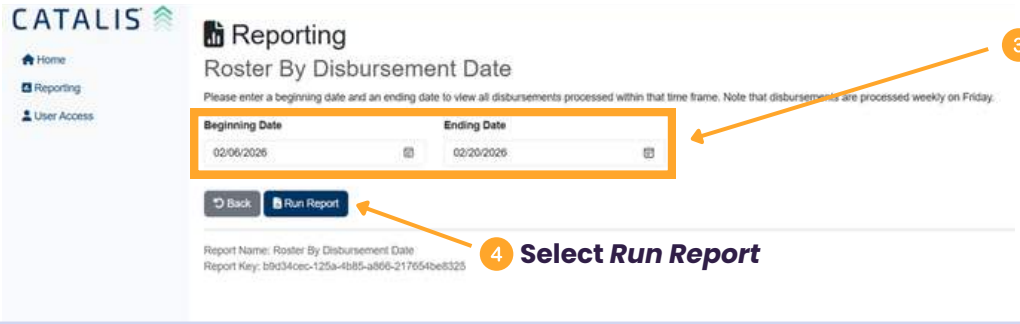
Your U.Plan Distribution Roster, which reflects the U.Plan Tuition Certificate proceeds for students who have confirmed enrollment at your school, is available for download within your U.Plan online account. To view your roster online, please follow the steps below.

If you have not yet set up your online account, please email Claudia Niles at cniles@mefa.org for assistance.

▶ Access Your Roster: Log in at uplanschool.mefa.org/login



▶ Run the Report



3 **Enter a beginning date and an ending date to view all disbursements processed within that time frame**

- Disbursements are processed weekly on Friday
- For most institutions, the first scheduled disbursement date for the academic year is the first Friday in August

▶ View the Report

Roster By Disbursement Date
2026-02-06 thru 2026-02-20
Executed On 5/6/2026, 1:41:43 PM

PROGRAM	Tuition and Fees	Student Name	SSN	Student Address	Transaction Date	Academic Year	Payment Amount	School Contribution	Student Credit
On Campus - In State	$17,664.00	Sample, Student A	XXX-XX-1135	7 Dan St. Boston, MA 02110	2/6/2026	2025	$8,472.26	$1,417.26	$9,889.52
On Campus - In State	$17,664.00	Sample, Student B	XXX-XX-3598	1 Park St. Boston MA 02110	2/6/2026	2025	$9,416.38	$584.38	$10,000.76
On Campus - In State	$17,664.00	Sample, Student C	XXX-XX-6175	2 Hale St. Boston, MA 02110	2/6/2026	2025	$9,664.06	-$1,466.41	$8,197.65
							$27,552.70	$535.23	$28,087.93

5 **Export report to Excel if desired**

The last column indicates the amount that should be credited to each student's account

If you see a negative amount in the ***School Contribution*** **column**, the school is entitled to keep the excess funds because the increase of tuition/mandatory fees is less than the rate of CPI plus 2% but greater than the U.Plan participant's cash payment.