



# Working with the U.Plan for College Administrators

July 29<sup>th</sup>, 2019

# Presenters

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# Agenda

Overview of U.Plan Transition Online  
College Administrator Access

- Email from U.S. Bank
- Website to Log In

Live Demo of Site

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

# College Admin Access- Email from U.S. Bank

- For security reasons, users were pre-provided by U.S. Bank, our partner financial organizations.
- You should have received an email from MEFA explaining the transition and then 2 emails from U.S. Bank: one with your username and one with your temporary provisioning code.
  - If you did not receive these, or did not take action, please let us know. The emails went out the end of June and the code was only valid for 14 days, so we are collecting names to re-provision.
  - Also, we are encouraging everyone to check their junk/spam folders!

# Email from MEFA

Dear <INSERT COLLEGE/UNIVERSITY ADMINISTRATOR>,

Recently, an announcement was sent to all individuals saving in MEFA's [U.Plan](#) Prepaid Tuition Program notifying them of exciting enhancements to the program. With these enhancements, [U.Plan](#) savers will now have the ability to manage their account online, save throughout the year for the purchase of Tuition Certificates, and send funds directly to a college or university.

**As part of these enhancements, we have also enhanced functionality for our [U.Plan](#) school administrators. Beginning today, [U.Plan](#) administrators will now have the ability to:**

- **Create an online [U.Plan](#) school administrator user account**
- **View and manage [U.Plan](#) rosters online**
- **Set-up ACH/EFT to receive [U.Plan](#) funds electronically**

All of these changes are possible because of our work with U.S. Bank Global Fund Services. A leader in consumer banking, U.S. Bank Global Fund Services now acts as the [U.Plan](#)'s program record keeper, helping to manage our 24-7 online access and providing valuable customer support. MEFA remains the administrator of the program.

## What We Need from You:

**STEP 1:** We are encouraging all college and university [U.Plan](#) administrators to create a school administrator user account. Shortly, you will receive **two emails** from U.S. Bank. The first email will contain a link to set up your online user account. The second email will contain your secret code to complete registration. **This code will remain valid for 14 days.** Please be on the lookout for this email as it is scheduled to arrive today (please check your spam folder as well). For convenience, we have attached screen shots of the log in process.

# — Emails from U.S. Bank



# Website to Log Into U.Plan

**mefa**<sup>®</sup> What We Offer Blog Events About Us **For College Administrators** For Counselors

MASSACHUSETTS EDUCATIONAL FINANCING AUTHORITY

**MAKE A PLAN** **START SAVING** **PAY FOR COLLEGE** **MEFA LOANS**

## U.Plan Prepaid Tuition Program

We partner with over 70 Massachusetts colleges and universities to offer the U.Plan Prepaid Tuition Program to families. If your school participates in the U.Plan and you serve as a U.Plan administrator, make sure to create an online account to manage your U.Plan rosters and set up ACH/EFT to receive U.Plan funds electronically. To set up an online account, please contact Claudia Niles at [cniles@mefa.org](mailto:cniles@mefa.org).

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, or Safari for Mac – two latest versions.

[Log in to the U.Plan](#)

**PAYING FOR COLLEGE**

### What You Need to Know About MEFA Loans

by Meredith Barnhart

Get the facts including interest rates, no fees, instant application decision, multiple repayment options, set monthly payments, and expert guidance.

**COMMUNITY EVENTS**

### Dreams Tour at Lowell Folk Festival

July 27, 2019



# U.Plan Landing Page

Welcome to the U.Plan Prepaid Tuition Program. We look forward to helping you save for college.

**PLEASE NOTE:** Beginning August 1, 2019, new and existing U.Plan savers may begin making deposits to lock in tuition and mandatory fee rates for the 2020-21 academic year. Until that date, all existing U.Plan savers may continue to view their accounts online.

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](#)

jsparling8



[Forgot Password](#)

.....

Remember my User Id

## Live Demo of Site

Questions?  
Thank you!

Contact Information:

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