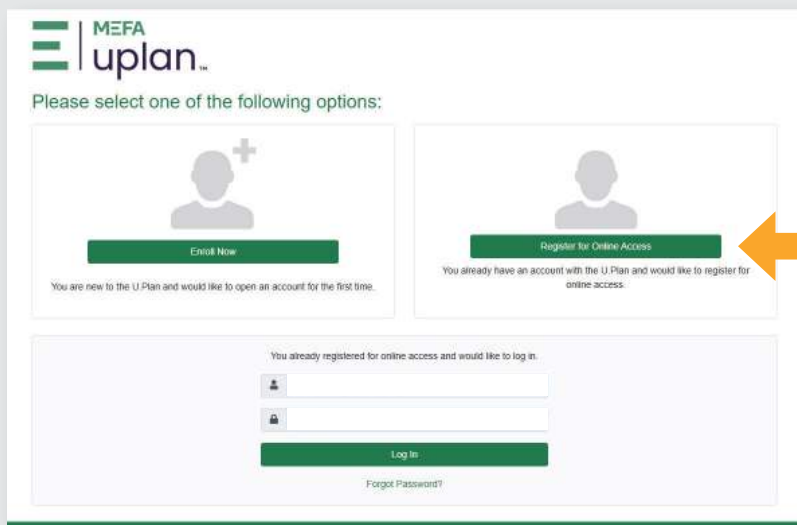


## MASSACHUSETTS EDUCATION FINANCING AUTHORITY (MEFA) U.PLAN ONLINE REGISTRATION GUIDE

1

Visit **uplan.mefa.org** to register for online access.



The screenshot shows the MEFA uplan website's login and registration interface. At the top, the MEFA uplan logo is displayed. Below it, the text "Please select one of the following options:" is shown. There are two main options: "Enroll Now" (for new users) and "Register for Online Access" (for existing users). An orange arrow points from the "Register for Online Access" button to the right, towards step 2. Below these options is a login section for users who are already registered, with fields for email and password, and a "Log In" button. A "Forgot Password?" link is also present.

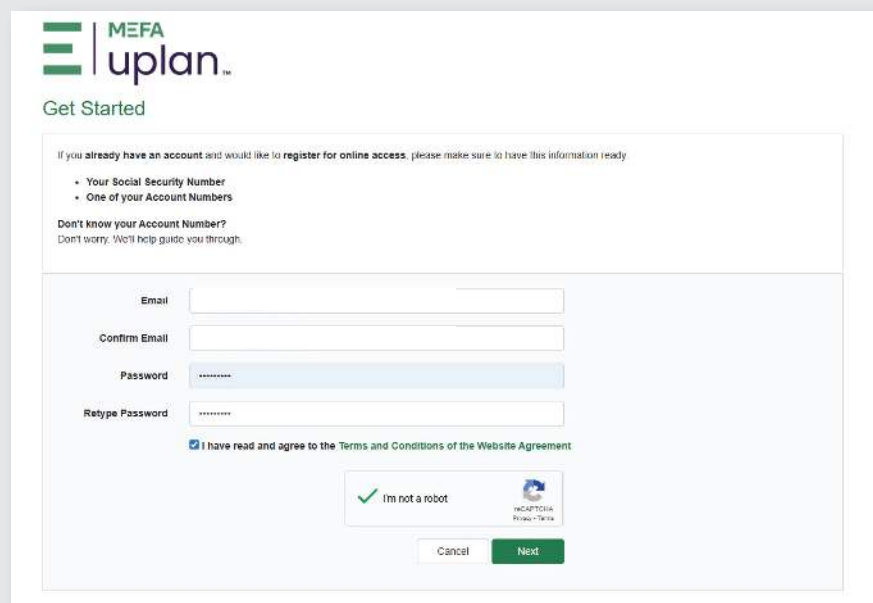
2

Click here to begin registering and linking your account.

3

Create your user ID by entering your email address and choosing a password.

Review the Website Agreement by clicking the green link. Check the box to indicate that you have reviewed and agree to the terms.



The screenshot shows the "Get Started" registration form on the MEFA uplan website. The form is titled "Get Started" and includes a heading "If you already have an account and would like to register for online access, please make sure to have this information ready:". Below this, there are bullet points for "Your Social Security Number" and "One of your Account Numbers". A section titled "Don't know your Account Number?" provides a link to "Don't worry. We'll help guide you through:". The form contains input fields for "Email", "Confirm Email", "Password", and "Retype Password". A checkbox labeled "I have read and agree to the Terms and Conditions of the Website Agreement" is checked. At the bottom, there is a reCAPTCHA widget with the text "I'm not a robot" and a "Next" button. A "Cancel" button is also present.

4

Next, choose your security questions and enter your answers.

You'll need to know these answers in case you ever need to reset your login information.

5

On this next step, you will choose how you receive your documents.

Once your account is registered, you can change your election at anytime using Delivery Options under Profile.

6

Finally, you will need to enter the following information to complete the registration process:

- » Your Social Security Number
- » Your U.Plan Account Number

If you don't know your Account number, click **Forgot Account Number?** and we will help you retrieve it.



### Don't know your Account Number?

Enter your SSN and your Beneficiary's date of birth and we will retrieve your account number for you.

If you have more than one Beneficiary, you may use any of their dates of birth to complete this process.

The screenshot shows the MEFA Uplan website interface. At the top, there is a green navigation bar with the MEFA Uplan logo on the left and links for Home, Profile, and Logout on the right. Below the navigation bar, the heading 'Retrieve Your Account Number' is displayed, followed by the instruction: 'Please provide your Social Security Number and any one of your beneficiary's Date of Birth for us to link your accounts.' The form contains two input fields: 'Your Social Security Number\*' with a placeholder 'XXX-XX-XXXX' and 'Beneficiary Date of Birth\*' with a placeholder 'MM/DD/YYYY' and a calendar icon. At the bottom of the form are 'Back' and 'Next' buttons.



### Have additional questions?

Email us at [uplan@mefa.org](mailto:uplan@mefa.org)  
or give us a call at **(888) 590-5653**.