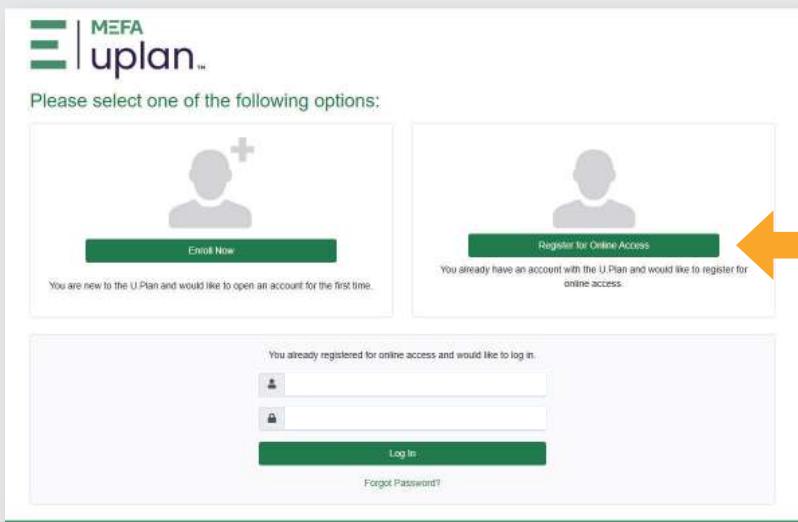


## MASSACHUSETTS EDUCATION FINANCING AUTHORITY (MEFA) U.PLAN ONLINE REGISTRATION GUIDE

1

Visit [uplan.mefa.org](http://uplan.mefa.org) to register for online access.



The screenshot shows the homepage of uplan.mefa.org. At the top, there is a logo for MEFA uplan. Below the logo, a message says "Please select one of the following options:". There are three main options: 1. "Enroll Now" (for new users), 2. "Register for Online Access" (for existing users), and 3. "Log In" (for users who are already registered). An orange arrow points to the "Register for Online Access" button.

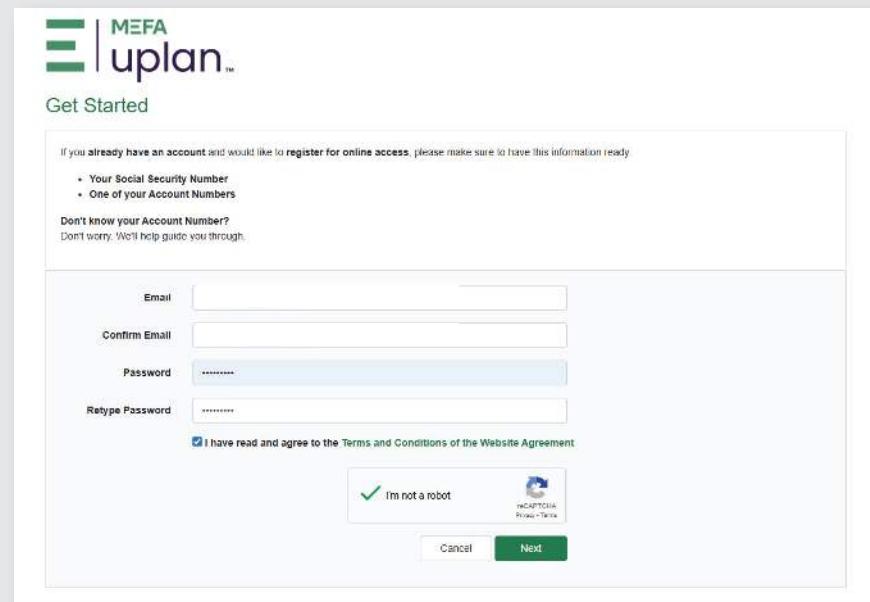
2

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.

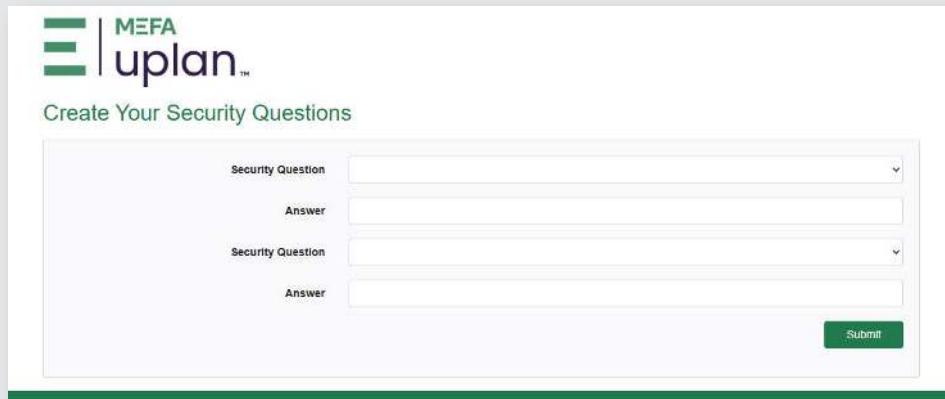


The screenshot shows the "Get Started" registration page. At the top, there is a logo for MEFA uplan. Below the logo, a message says "Get Started". There is a note: "If you already have an account and would like to register for online access, please make sure to have this information ready." It lists "Your Social Security Number" and "One of your Account Numbers". There is a link "Don't know your Account Number?". Below this, there are fields for "Email", "Confirm Email", "Password", and "Retype Password". There is a checkbox "I have read and agree to the Terms and Conditions of the Website Agreement". Below the checkbox is a CAPTCHA field with the text "I'm not a robot" and a CAPTCHA image. At the bottom, there are "Cancel" and "Next" buttons.

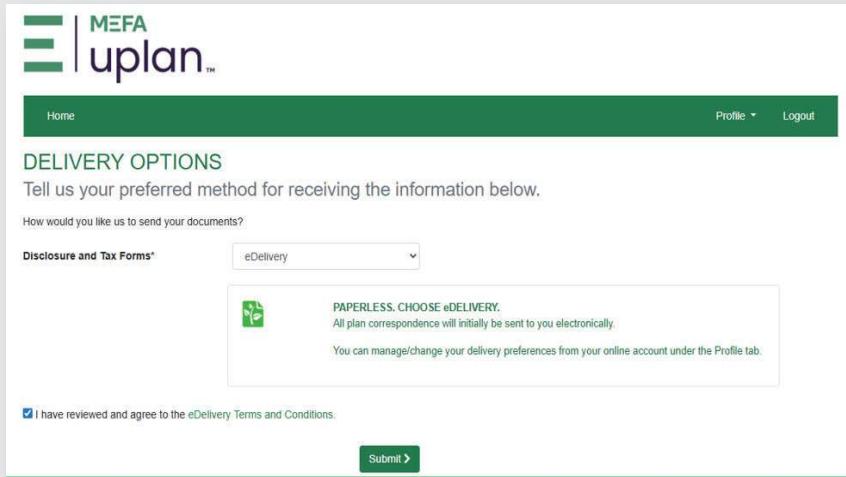
4

Next, choose your security questions and enter your answers.

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



The screenshot shows the 'Create Your Security Questions' page. At the top, the MEFA U.Plan logo is displayed. Below it, the heading 'Create Your Security Questions' is centered. The page contains two sets of fields for creating security questions and answers. Each set includes a 'Security Question' dropdown menu and an 'Answer' text input field. There are two such pairs. A 'Submit' button is located in the bottom right corner of the form area.



The screenshot shows the 'DELIVERY OPTIONS' page. The top navigation bar includes 'Home', 'Profile', and 'Logout'. The main content area is titled 'DELIVERY OPTIONS' and contains the sub-instruction 'Tell us your preferred method for receiving the information below.' Below this, a question 'How would you like us to send your documents?' is followed by a dropdown menu set to 'eDelivery'. A callout box titled 'PAPERLESS. CHOOSE eDELIVERY.' explains that all plan correspondence will be sent electronically. A note states that delivery preferences can be managed from the Profile tab. At the bottom, a checkbox is checked with the text 'I have reviewed and agree to the eDelivery Terms and Conditions.' and a 'Submit' button is visible.

5

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

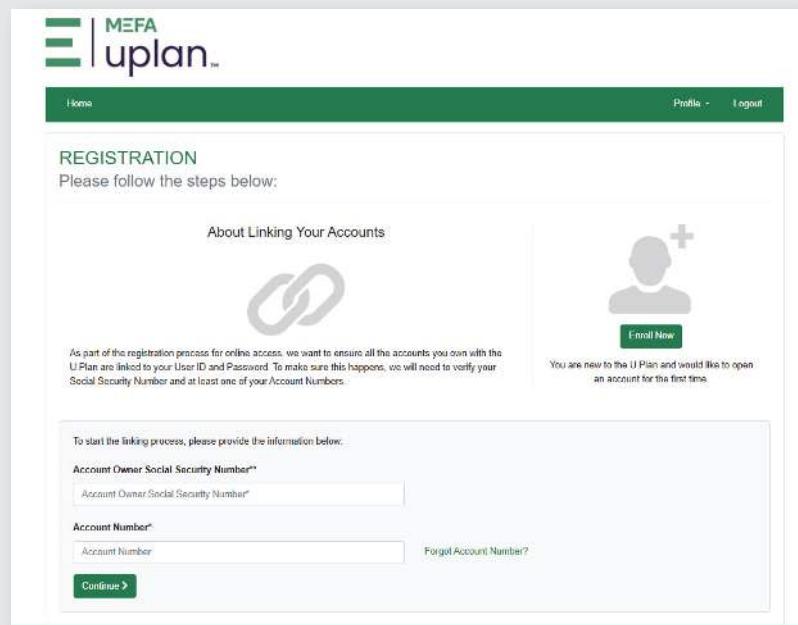
Once your account is registered, you can change your election at anytime using Delivery Options under Profile.

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.



The screenshot shows the 'REGISTRATION' page. The top navigation bar includes 'Home', 'Profile', and 'Logout'. The main content area is titled 'REGISTRATION' with the sub-instruction 'Please follow the steps below:'. It features two sections: 'About Linking Your Accounts' with an icon of two interlocking circles, and 'You are new to the U.Plan and would like to open an account for the first time.' with an icon of a person silhouette and a plus sign. Below these, a section titled 'To start the linking process, please provide the information below.' contains three input fields: 'Account Owner Social Security Number\*', 'Account Owner Social Security Number\*', and 'Account Number\*'. A 'Forgot Account Number?' link is also present. A 'Continue' button is located at the bottom of the form.



## 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. At the top, there is a green header bar with the MEFA uplan logo, a 'Home' link, and a 'Profile' dropdown menu. Below the header, the page title is 'Retrieve Your Account Number'. A sub-instruction reads: 'Please provide your Social Security Number and any one of your beneficiary's Date of Birth for us to link your accounts.' There are two input fields: 'Your Social Security Number\*' with placeholder 'XXX XX XXXXX' and 'Beneficiary Date of Birth\*' with placeholder 'MM/DD/YYYY'. Below the fields are 'Back' and 'Next' buttons. The entire form is contained within a light gray box.



## Have additional questions?

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