



Prepaid Plan Overpayment Refund / Transfer Request Process

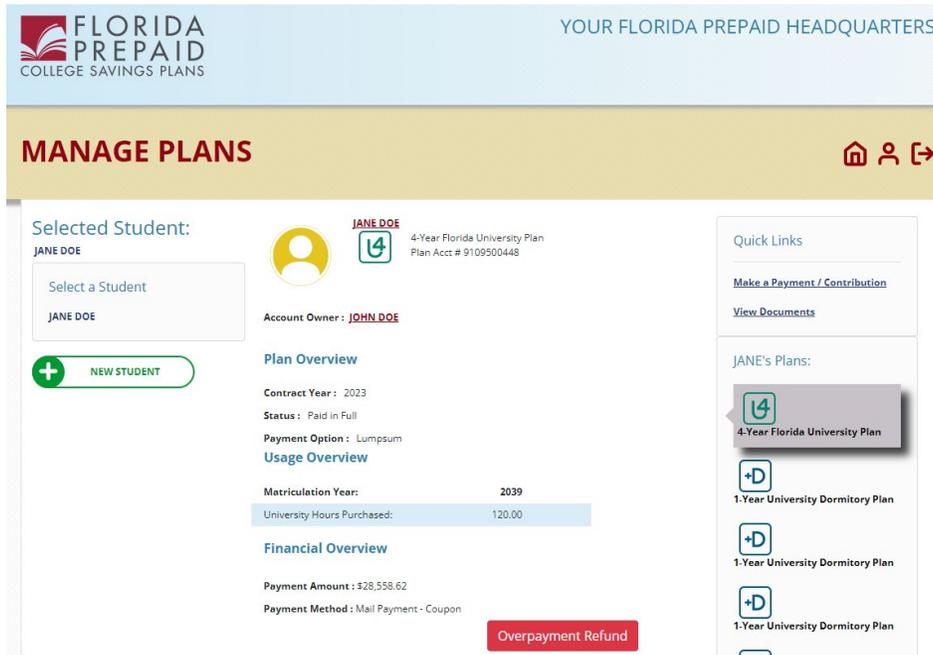
You may view your new Plan price and request an overpayment refund by **logging into your account** at myfloridaprepaid.com and selecting your student's Prepaid Plan.

- You will see your new lower Prepaid Plan price in the Financial Overview section.
- Click the red *Overpayment Refund* button to initiate a refund or move funds into a 529 Savings Plan. Learn more here.
- Many families choose to move their refund into a Florida 529 Savings Plan to save for additional college expenses like books, room and board, supplies, and computers.
- Refunds may take up to 4-6 weeks from time of request.

Step 1: Select Student

The screenshot shows the Florida Prepaid website dashboard. At the top left is the Florida Prepaid logo and the text "COLLEGE SAVINGS PLANS". At the top right, it says "YOUR FLORIDA PREPAID HEADQUARTERS". Below this is a navigation bar with "HOME" in red and icons for home, user, and help. The main content area is divided into several sections. On the left, there is a "Welcome, JOHN DOE" message with a user profile icon and email address "Email: mmvtest18@testpp.com". Below this is a "Select a Student" section with a search bar containing "JANE DOE" and a "NEW STUDENT" button with a plus sign. On the right, there is a purple circular icon with a gift and the text "Invite friends & family to contribute to your College Savings Plans." Below that is a box titled "Applications Completed but not processed" with a link to "Jane Doe". At the bottom right, there is a "News & Announcements" section with a sub-heading "Have You Linked All of Your Plans for Online Access?" and a paragraph of text. Below that is another sub-heading "Florida 529 Savings Plan Updates" with a paragraph of text and a bullet point.

Step 3: Select red *Overpayment Refund* button to initiate a refund or move funds into a 529 Savings Plan (existing or new)



The screenshot shows the 'MANAGE PLANS' dashboard for a student named JANE DOE. The page header includes the Florida Prepaid logo and 'YOUR FLORIDA PREPAID HEADQUARTERS'. The main navigation bar is labeled 'MANAGE PLANS' and includes icons for home, user profile, and navigation. The dashboard is divided into several sections:

- Selected Student:** A dropdown menu showing 'JANE DOE' and a '+ NEW STUDENT' button.
- Account Owner:** JOHN DOE
- Plan Overview:**
 - Contract Year: 2023
 - Status: Paid in Full
 - Payment Option: Lumpsum
 - Usage Overview:
 - Matriculation Year: 2039
 - University Hours Purchased: 120.00
- Financial Overview:**
 - Payment Amount: \$28,558.62
 - Payment Method: Mail Payment - Coupon

On the right side, there are 'Quick Links' for 'Make a Payment / Contribution' and 'View Documents', and a list of 'JANE's Plans' including a highlighted '4-Year Florida University Plan' and three '1-Year University Dormitory Plan' entries. A red 'Overpayment Refund' button is located at the bottom right of the main content area.

Step 4: Verify / update your contact information



YOUR FLORIDA PREPAID HEADQUARTERS

Update Contact

Please update or verify your address to continue.

Fields marked * require an entry.

* Address 1 (Street or PO Box) * City * State * Zip

1411 S LAKESIDE DR LAKE WORTH FL 33460-5709

Address 2 (Apt, Suite, Unit, Floor)

* Primary Secondary

850-555-5555 XXX-XXX-XXXX

* Email
(If you want to receive authentication codes to this email address, be sure to update your profile email on the 'Your Profile' tab.)

MRWTEST18@TESTFPP.COM

Apply to:

JOHN DOE - Account Owner

Cancel Submit



YOUR FLORIDA PREPAID HEADQUARTERS

Confirmation Message

Update Contact Information

You have successfully updated the contact information for the following account(s):

JOHN DOE - Account Owner

Continue >

Step 5: Input the refund amount(s) you are requesting and choose your Refund Option (check, 529 Savings Plan).

- Many families choose to move their refund into a Florida 529 Savings Plan to save for additional college expenses like books, room and board, supplies, and computers. You may open a new 529 Savings Plan account during this process if you do not already have one.
- Refunds may take up to 4-6 weeks.



**FLORIDA
PREPAID**
COLLEGE SAVINGS PLANS

YOUR FLORIDA PREPAID HEADQUARTERS

OVERPAYMENT REFUND





Selected Student:

Select a Student

JANE DOE



JANE DOE

4-Year Florida University Plan
Plan Acct # 9109500448

Account Owner: **JOHN DOE**

Prepaid Plans with Overpayments

- If your account is not Paid In Full, any overpayment is currently being applied to the total amount due. Electing to take an Overpayment Refund may affect your Next Payment Due date.
- Please allow up to 45 days to receive your refund.

Plan Acct #	Overpayment	Other	Total
9109500448	<input checked="" type="radio"/> \$7,441.38	<input type="radio"/> \$ <input type="text"/>	\$7,441.38
9209500455	<input checked="" type="radio"/> \$12,271.76	<input type="radio"/> \$ <input type="text"/>	\$12,271.76
9209500463	<input checked="" type="radio"/> \$7,271.76	<input type="radio"/> \$ <input type="text"/>	\$7,271.76
9209500471	<input checked="" type="radio"/> \$7,271.76	<input type="radio"/> \$ <input type="text"/>	\$7,271.76
9209500489	<input checked="" type="radio"/> \$7,271.76	<input type="radio"/> \$ <input type="text"/>	\$7,271.76

Clear Selections

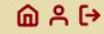
Total Refund Requested: \$41,528.42

If you would like to get a head start saving for other college expenses you may contribute your refund into a Florida 529 Savings Plan. Contributions into existing Plans will follow current allocations; contributions to new Plans will be allocated to the Money Market Fund. While Prepaid Plans cover tuition and fees, Savings Plans cover expenses like books, room and board, supplies, and computers.

Refund Option: Open a New 529 Savings F

Submit Refund Request

Confirmation Message



Successful Submission - Overpayment Refund Request

OPEN A NEW SAVINGS PLAN CONFIRMATION



Date: 12/18/2023

Your request to open a new Savings Plan has been submitted. Please allow up to 15 business days for processing.

Once the request has been processed, you will receive confirmation of the new Savings Plan.

Contributions into existing Plans will follow current allocations; contributions to new Plans will be allocated to the Money Market Fund. To learn more about the Florida 529 Savings Plan please visit www.myfloridaprepaid.com

Please contact Customer Service at 1-800-552-4723 for any further information on the processing of the Overpayment Refund request.

Purchaser name: JOHN DOE

Beneficiary name: JANE DOE

Plans selected for Overpayment Refund:

9109500448

Requested Amount: \$7441.38

9209500455

Requested Amount: \$12271.76

9209500463

Requested Amount: \$7271.76

9209500471

Requested Amount: \$7271.76

9209500489

Requested Amount: \$7271.76

Total Amount Requested: \$41528.42

Continue