THE STUDENT CENTER PAGE
How to navigate through the ACADEMICS & FINANCES sections

Below is a full view of the Student Center page. The name of each section is provided in a leading blue bar. For purposes of this worksheet, the full view of the Student Center page is provided on two pages. To view each section on the computer, use the *scroll* function.

FULL VIEW OF A SAMPLE STUDENT CENTER PAGE:

Academics

Enrollment
My Class Schedule
Add a Class
Drop a Class
Priority Choice

Academic History
Grades
Degree Progress

other academic...

Upcoming Schedule

Class	Schedule
EDUC 300-03 LEC (6251)	Th 5:10PM - 7:00PM Cotchett Education 213
EDUC 300-04 ACT (6252)	Location: TBA
ENGL 303-01 LEC (2120)	TuTh 9:10AM - 11:00AM English 0212
ENGL 365-01 LEC (4564)	MoWe 5:40PM - 7:00PM Frank E. Pilling 0253
ENGL 365-02 ACT (5477)	Location: TBA
ENGL 391-01 LEC (3832)	MoTuWeTh 2:10PM - 3:00PM Cotchett Education 013

weekly schedule

SEARCH FOR CLASSES

Holds and Warnings

No Holds.

To Do List

09/10 Parent PLUS Loan
High School Transcript
Loan Rights & Responsibilities
Master Promissory Note-Par
Master Promissory Note-Stdt

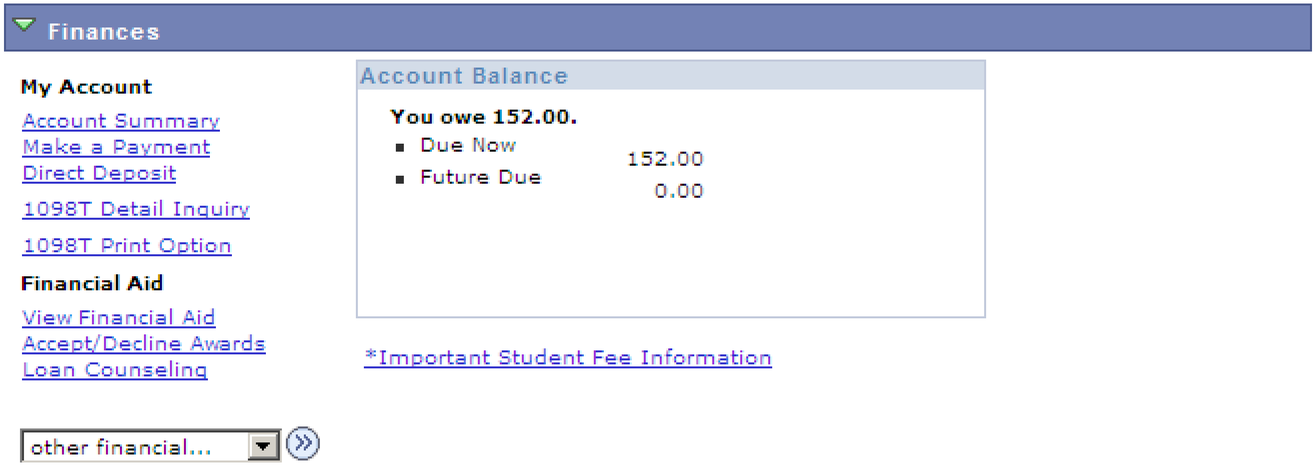
details

Money Matters

Financial Aid Information
Fee and Payment Information

Dates, Deadlines & Other Info

Calendars/Deadlines



Personal Information

Information in this section is managed through the **Personal Info Tab** on the student’s portal.

Admissions

Information in the section (application status) is managed by the Admissions Office.

Student Center page access instructions provided on the next page…

ACCESSING THE STUDENT CENTER PAGE THROUGH THE CAL POLY PORTAL:

Please access your Student Center Page using the instructions provided below:

- Log on to the **My.calpoly portal**
- Click on the **Money Matters tab**
- Scroll to the **Financial Links** channel
- Click on the **Student Center** link

Once you are logged into your Student Center Page, please use the information provided below to navigate through the page.

The Student Center page is split into sections that are labeled by leading blue bars.

The first section is **ACADEMICS**. This section outlines the student's current class schedule, grades, and related academic information.

To the right of the **ACADEMICS** section are boxes with additional account information that may be affecting (or will affect) the student's ability to register, receive financial aid funds, and/or access transcripts.

To the right of the **ACADEMICS** section, you will find a few mini-sections (summarized below). Although small, they still provide valuable information.

The **HOLDS AND WARNINGS** section will let the student know why they cannot register or access transcripts. The **TO DO List** will reference paperwork/information needed by a Cal Poly department. **TO DO List** items can also be the reason as student cannot register or access transcripts.

>>>> About 2 weeks before each student is scheduled to register for an upcoming term, an **ENROLLMENT APPOINTMENT** section is added. The student's scheduled enrollment date will be posted. To determine the *start time,* the student should use the link provided in the **Dates, Deadlines & Other Info** section.

The **MONEY MATTERS** section offers links to both the Financial Aid and Student Accounts websites. The Fee and Payment Information link will provide the student with general registration, housing, and meal plan amounts and due dates for the current school year. It also outlines Cal Poly's payment policy, and class cancellation dates (to understand how payment policy may affect an account, the student should read through it thoroughly).

The **Dates, Deadlines & Other Info** section is populated with a link that will take the student to the Office of Academic Records website. The website offers calendars for student planning, registration – as well as additional helpful information.

Below the ACADEMICS section is the **FINANCES** section.

The **FINANCES** section will provide the student with a variety of financial information (outlined below).

The links provided under the words ***My Account*** are related to the financial management of the student account:

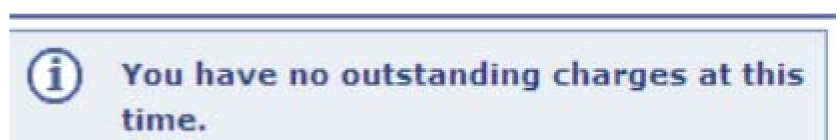
Account summary link:	A quick view of each term's balance (unapplied credits, and/or unpaid charges).
Make a Payment link:	Cal Poly's on line payment site (pay by check or credit card).
Direct Deposit link:	Where to enter, review, and edit the student's personal bank account information so that Cal Poly can refund money to the student securely and quickly. Important: Students are <u>required</u> to sign up for direct deposit.
1098T Detail Inquiry link:	An annual statement (Cal poly provides to the IRS) of applicable charges posted to the student's account in the previous calendar year. NOTE: students who receive more grant and/or scholarship funds in the terms charged on the 1098T will not receive a 1098T.
1098T Print Option:	For security reasons, students are strongly encouraged to select the *electronic 1098T* option.

The links provided under the words ***Financial Aid*** are related to the student's financial aid award – if applicable (loans, grants, scholarships):

View Financial Aid link:	The student can view their financial aid award and scheduled disbursement dates for multiple award years. They can also view previously declined financial aid offered.
Accept/Decline Awards link:	Students need to accept their financial aid award (per fund), or decline the offer (if they don't want it).
Loan Counseling link:	Students receiving federal student loans are required to complete entrance counseling before their first disbursement will fund.

In the center of the **FINANCES** section is a shaded box that will indicate amounts due, or past due – or will indicate that the student has no outstanding Charges (examples of both boxes below):

OR



For detailed information regarding account charges, credits (payments made by the student, and/or financial aid disbursements), and refunds, the student should become familiar with the drop down menu at the bottom of the **FINANCES** section. To access complete account or payment information in date order, the student should open the drop down menu and choose an item:

other financial...

Choose **Account Activity** to view all transactions on the account in date order (charges, credits, refunds).
Choose **Payments** to view all payment activity in date order.

Just choose your option, and click on the (GO) button.

EXAMPLE: ACCOUNT ACTIVITY PAGE:

Account Activity

View by

From 02/19/2009 To 08/19/2009 All Terms go

Transactions Find | View All First 1-10 of 38

Posted Date	Item	Term	Charge	Payment	Refund
08/19/2009	64060504 Adj PCV Spr Rent	Spring Quarter 2010		1,941.00	
08/19/2009	64060502 Adj PCV Wtr Rent	Winter Quarter 2010		2,089.00	
08/19/2009	41000700 Non Ref Install Fee C	Fall Quarter 2009	15.00		
08/10/2009	90000008 Pymt Fall Reg	Fall Quarter 2009		224.00	
08/10/2009	90450008 Pymt Apt Fall	Fall Quarter 2009		775.00	
08/10/2009	90450008 Pymt	Fall Quarter		850.00	

Using the **From** and **To** prompts (along with the **go** key), the student can choose a date range of information only. The student can also choose a particular quarter's transactions (again, using the GO key for results to populate).

If no date range or term is preferred, the page will automatically populate all transactions in date order – the most recent first. To view as many line items as possible on one page, we recommend that you click on the ***View All*** words in the blue bar (to the right of the word ***Transactions***). This will allow as many lines to populate each page as possible.

Under the deep blue bar (with the word ***Transactions*** in it), is a lighter blue bar. The lighter blue bar references the column titles:

Posted Date	Item	Term	Charge	Payment	Refund
▼	▼	▼	▼	▼	▼
Date of transaction	Brief item description	Affected term	Amounts charged: Reg fees* Housing Meals Etc.	Financial aid applied, or payments made by student, & account adjustment entries	Financial aid or cash refunds given back to student

* Registration fees are comprised from a variety of individual fees charged to each student. The **ACCOUNT ACTIVITY PAGE** references each individual charge on a separate line. Combined, they total the student's registration fee total.

To exit the **ACCOUNT ACTIVITY PAGE**, use the **go to** drop down menu and choose a destination:

EXAMPLE: PAYMENT HISTORY PAGE:

Payment History

From 02/19/2009 To 08/19/2009 go

Posted Payments Find | View All First 1-5 of 9 Last

Date Paid	Payment Type	Paid Amount
08/19/2009	64060504 Adj PCV Spr Rent	1,941.00
08/19/2009	64060502 Adj PCV Wtr Rent	2,089.00
08/10/2009	90450008 Pymt Apt Fall	775.00
08/10/2009	90450008 Pymt Apt Fall	850.00
08/10/2009	90000008 Pymt Fall Reg	224.00

First 1-5 of 9 Last

The student can choose a date range of information, or can click on **View All** (and the **go** key) to view credit activity in date order.

All amounts referenced in the **Paid Amount** column are credits (reduce charges). Credits may be comprised of payments made by the student, financial aid funds disbursed into the student's account, and/or account adjustments.

Financial aid funds disbursed to a student's account will pay only applicable charges specific to the term it is disbursed into (such as registration fees, housing fees and meal plan fees). Students are strongly encouraged to check the status of their Cal poly student account on a weekly basis throughout each term. Unpaid charges will prevent the student from registering for the upcoming term.

To exit the **ACCOUNT ACTIVITY PAGE**, use the **go to** drop down menu and choose a destination:

go to ...