

Cal Poly Health Service Fee Guidelines and Procedures

Purpose:

The purpose of this document is to establish guidelines and procedures for the Cal Poly Health Service Fee.

Background:

The Health Service Fee is a mandatory campus-based fee assessed to support the delivery of student health services at Cal Poly. Revenue supports the operation of Campus Health & Wellbeing and provides access to basic student health services consistent with CSU policy. In January 2018, the Cal Poly president communicated his approval to increase the Health Service Fee by \$99 per quarter for newly admitted students beginning in Fall quarter, 2018, with 4% annual increases thereafter. The approved fee adjustment included a stipulation that 30% of the additional fee amount be set aside for financial aid.

CSU Executive Order 943 is a policy on University Health Services and states that Student Health Centers should be established and maintained to facilitate the retention of students enrolled in state-supported programs and to enhance academic performance through accessible, high-quality medical care, public health prevention programs, and educational programs and services.

CSU Executive Order 943 further provides that basic health services are to be available to eligible students who have paid the mandatory student health fee, subject to the scope, staffing, facilities, and equipment available at each campus. Basic services include primary outpatient care, family planning services, public health prevention programs, health education, evaluation and guidance for individual health problems, clinical laboratory diagnostic services, basic diagnostic X-ray services, pharmacy services, medical liaison services, consultation and referral to off-campus providers, and consultative services on campus health issues.

CSU Executive Order 1053 similarly governs the provision of mental health services to eligible CSU students. Its purpose is to ensure that campuses establish and maintain accessible, professional mental health care; counseling, outreach, consultation, and educational programs and services that enhance students' academic performance and facilitate their retention in state-supported programs. EO 1053 further provides that campuses may use mandatory Student Health Services Fee revenue to support the provision of basic mental health services. At Cal Poly, Campus Health & Wellbeing provides general medical and mental health care to registered students who have paid the mandatory Health Service Fee. Currently enrolled students may receive covered general medical and mental health care without an additional visit fee or in-house lab charge. Students may remain responsible for allowable reference laboratory charges, prescriptions, specialty services, and other authorized charges. However, tests designated by EO 943 as required basic services—including complete blood

count, urinalysis, screening cultures, and urine pregnancy tests—must be provided without an additional charge regardless of where performed. Establishment or adjustment of the Health Service Fee is subject to the CSU Student Tuition and Fee Policy and applicable Cal Poly consultation procedures.

Applicability of fee:

The Health Service Fee is a campus-based mandatory Category II fee charged to eligible students in accordance with the Student Tuition and Fee Policy, the applicable fee schedule, and Cal Poly procedures. The fee is separate from tuition and other per-unit charges established by the CSU Board of Trustees. Revenue from the fee supports access to basic student health and mental health services provided through Campus Health & Wellbeing. Eligibility for services, including any exceptions, waivers, reciprocal services, continuing student access, summer access, self-support program access, or other special circumstances, must be administered in accordance with CSU Executive Order 943, CSU Executive Order 1053, CSU student fee policy, and applicable Cal Poly procedures.

Health Service Fee revenues, including any interest earned (if any), must be accounted for separately and used to support Student Health Center operations and authorized student health services. Fees charged for basic services may not substantially exceed the cost of providing those services, and additional charges for basic services may be assessed only as permitted by CSU policy, including charges for reference laboratory tests and the actual acquisition cost of vaccines, medications, devices, or appliances.

Definitions:

Augmented Services: Elective or specialized health services not included in basic services and that may be offered by the Student Health Center when authorized under Executive Order 943 and approved through campus procedures

Basic Mental Health Services: The core mental health services provided to currently enrolled students under CSU Executive Order 1053, including short-term counseling and psychotherapy; suicide, personal violence, emergency, and crisis response; mental health outreach and consultation; and referrals to appropriate campus or community resources when a student's needs exceed the scope of campus services. These services are intended to support student wellbeing, academic success, and retention.

Basic Student Health Services: The core health services described in Executive Order 943 and made available to eligible matriculated students who have paid the appropriate mandatory student health fee, subject to campus resources and authorized scope of service

Business Purpose: Specific reason or justification for a business-related transaction, expense, or activity that demonstrates how it supports or advances the goals and operations of the

organization and satisfies the intent or restrictions of the funding source utilized. A valid business purpose should be clear, avoid internal abbreviations, and use descriptions anyone can easily understand. Supporting documentation may include itineraries, meeting agendas, invitations, conference programs, ticket confirmations, or email communications. A business purpose must clearly answer:

- Who attended or benefited (name individuals, departments)
- What activities took place (meeting, conference, donor engagement, etc.)
- When and where the activity occurred (dates, locations)
- Why it was necessary
- How it benefits the university and meets the restrictions of the funding source utilized

Cal Poly Campus Health & Wellbeing: The Cal Poly unit responsible for administering student health and wellbeing services, including Health Services, Counseling and Psychological Services, and for supporting compliance with applicable CSU and campus policies

Category II Fee: A campus-based mandatory fee that students must pay to enroll in or attend the university, as defined by CSU Student fee policy

Chart Field String: A series of chart fields that categorize and track financial transactions. It is a unique combination of codes that provides detailed information about where money is coming from, how it's being spent, and who is responsible for the transaction

Executive Order 943: CSU Policy on University Health Services, which establishes the policy framework for CSU student health centers, basic and augmented services, student health advisory committees, funding, operations, quality assurance, and related oversight responsibilities

Executive Order 1053: CSU Policy on Student Mental Health, which develops and communicates systemwide policies, procedures, and/or guidelines for mental health services to matriculated students

Fiscal Authority: An individual with the Delegation of Fiscal Authority has been designated to review and approve transactions and authorize the expenditure of monies

Health Education: Educational, preventive, health-promoting, and supportive programs, services, activities, and resources designed to increase students' knowledge, skills, awareness, and capacity to make informed decisions and adopt behaviors that protect or improve their physical, mental, emotional, and social health and wellbeing. Health education includes, but is not limited to, education and programming related to nutrition, sexual and reproductive health,

communicable disease prevention, alcohol and other substance use, eating disorders, preventive health, mental and emotional wellbeing, stress management, healthy relationships, interpersonal and gender-based violence prevention, harm reduction, recovery, self-care, health literacy, and connection or referral to appropriate health and supportive services.

Health Service Fee: The Cal Poly campus-based mandatory student Health Service Fee assessed to support basic student health services and Student Health Center operations

Professional Development: Training, learning, and growth for faculty, staff, and administrators to enhance their skills, knowledge, and effectiveness in their roles and to improve student outcomes as related to the mission and guidelines of the Health Service Fee

Student Health Advisory Committee (SHAC): The committee established to advise the President or designee and Campus Health & Wellbeing on the scope of service, delivery, funding, student health needs, and other critical issues relating to campus health services

Delegation of Fiscal Authority:

Fiscal authorities should regularly monitor revenue assumptions, enrollment changes, expenditures, reserves, and year-end balances. Any reserve or carryforward plan should document its purpose, expected timing of use, relationship to student health services, and approval authority. Uncommitted balances may be subject to reallocation, carryforward review, or other university year-end budget procedures.

Division leaders, department managers, fiscal authorities, and Health Service Fee fund users are expected to provide active fiscal oversight for revenues and expenditures. Responsibilities include:

- Track and monitor Health Service Fee budgets, revenues, expenditures, commitments, and balances.
- Review and retain funding notifications, approvals, allocation records, pro formas, and related documentation.
- Verify expenses are recorded using the correct chart field string(s) and are recorded in the appropriate fiscal year.
- Verify that the funding source is appropriate and that each transaction is allowable, reasonable, accurate, justified, and compliant with all applicable rules, guidelines, and policies (e.g., Cal Poly procurement, travel, and hospitality policies), confidentiality requirements, and any approved funding plan or allocation.
- Ensure each transaction includes required support and a valid business purpose that clearly ties the expense to Student Health Center operations, basic student health services, authorized augmented services, or other approved Health Service Fee uses.
- Ensure adequate funds are available to cover expenses and, for multi-year commitments, confirm that budget plans are fiscally sound and sustainable.

Committee Purpose, Role, and Composition:

The Student Health Advisory Committee (SHAC) is advisory to the President or designee and the Student Health Center, operating within Campus Health & Wellbeing, on the scope of service, delivery, funding, and other critical issues relating to campus health services. The committee provides a student perspective on health needs, service access, student satisfaction, outreach, and proposed changes to services or funding. The Student Health Advisory Committee members serve a one-year term with no maximum number of terms.

Students shall constitute a majority of the committee's membership. The committee shall include a representative from the Student Health Center and may include appropriate faculty, administrative, and staff members. A student shall chair or co-chair the committee, consistent with Executive Order 943 and Cal Poly committee functions. The committee may consult with the Campus Fee Advisory Committee, University Budget & Fiscal Planning, Student Affairs, Administration and Finance, and other campus stakeholders when fee adjustments, consultation processes, or major funding changes are under consideration.

Committee responsibilities include:

- Obtain, review, and evaluate information concerning student health concerns, healthcare needs, and access to services.
- Review and provide feedback on scope of service, service delivery, funding priorities, student satisfaction, and outreach related to Cal Poly health services.
- Advise Campus Health & Wellbeing and university leadership on issues related to Health Service Fee stewardship and student health service priorities.
- Review each proposed augmented service before consideration by the President or designee. Documentation must demonstrate that the service will not divert resources or staff from adequate basic services; appropriate facilities, equipment, and qualified personnel are available; student need or demand has been established; and the proposed delivery method is effective in terms of treatment and cost.
- Assist in communicating with students about Campus Health & Wellbeing services and significant health service changes.
- Support reports, surveys, or information requests related to health services as assigned by university leadership.

Annual Planning Process:

The annual planning process should align Health Service Fee resources with the authorized purposes of the fee, the operating needs of Campus Health & Wellbeing, and student health priorities identified through assessment, utilization data, student feedback, and advisory committee input. The process should be documented and should provide a clear audit trail from budget development through allocation, expenditure, and impact reporting.

- University Budget & Fiscal Planning forecasts Health Service Fee revenue budget referencing the approved enrollment budget and fee rate and calculates the allocation split between Campus Health & Wellbeing and Financial Aid.
- Campus Health & Wellbeing identifies projected operating needs, compliance requirements, service demand, staffing, supplies, equipment, technology, facility, and other Student Health Center operational needs supported by the fee.

- SHAC reviews student health priorities, student feedback, relevant utilization and satisfaction data, proposed service changes, and any proposed augmented services or fee-related issues within its advisory scope.
- When new funding requests, fee adjustments, or significant expenditure changes are proposed, the responsible unit prepares documentation describing the need, financial assumptions, student impact, alignment with Executive Order 943, and any ongoing fiscal commitments.
- Campus Health & Wellbeing, under the direction of the Assistant Vice President for Student Affairs Health & Wellbeing or designee, prepares the projected annual Health Service Fee operating budget, including service utilization, staffing and benefit costs, operating expenses, reserves, carryforward balances, and planned support for authorized student health services.
- Required consultation with students and campus stakeholders occurs in accordance with CSU student fee policy and Cal Poly procedures, including involvement of the Campus Fee Advisory Committee when applicable.
- Final Health Service Fee operating budget allocations are approved through the university budget process by the appropriate Campus Health & Wellbeing, Student Affairs/Strategic Enrollment Management, and university budget authorities. Approved allocations are then recorded by University Budget & Fiscal Planning and communicated to responsible fiscal authorities and awardees before spending begins.
- Campus Health & Wellbeing publishes an annual Impact Report demonstrating how student health fee-supported services and programs support the Cal Poly community and benefit students.

Expenditure guidelines:

Of the revenue generated by the Health Service Fee, 30% of the additional fee amount will be set aside and made available for financial aid awards with the first priority to Cal Poly's neediest students. The remainder is allocated to Campus Health & Wellbeing.

Campus Health & Wellbeing departments and units that receive or expend Health Service Fee funding are responsible for ensuring expenses are appropriate, allowable, documented, and consistent with the approved purpose of the fee. Health Service Fee funds should be used to support Student Health Center operations, basic student health services, and related activities consistent with Executive Order 943 and campus approvals. Authorized augmented services may be supported within existing Student Health Center resources only when doing so does not divert staff or resources from the adequate provision of basic services. Any separate charge established to support augmented services must be approved and administered independently from the mandatory Health Service Fee and in accordance with EO 943 and CSU student fee policy.

Allowable uses may include, when properly approved and documented:

- Staffing, clinical personnel, student assistants, contracted services, and professional services necessary to provide or support student health services.
- Medical, clinical, laboratory, health education, public health, pharmacy, technology, equipment, supplies, and operational costs that support authorized services.

- Training, licensing, accreditation, quality assurance, compliance, risk management, and professional development directly tied to health service delivery or Student Health Center operations.
- Assessment, outreach, communications, data collection, and student engagement activities that support student health access, awareness, and service improvement.

Expenditure requirements:

- Expenses must comply with approved budgets, allocations, funding proposals, and applicable CSU and Cal Poly policies.
- Expenses must be recorded in a timely manner using the correct chart field string and must be reviewed regularly for accuracy.
- Miscoded or unsupported transactions must be corrected in a timely manner, and any concerns must be escalated to the appropriate fiscal, budget, or compliance office.
- Each transaction must include required supporting documentation and a clear business purpose showing how the expense supports eligible students, basic health services, authorized augmented services, or Student Health Center operations.
- Expenses that benefit multiple funding sources must be allocated based on a documented and reasonable methodology. The Health Service Fee portion must independently meet all Health Service Fee requirements.
- Costs that are primarily administrative, hospitality-related, travel-related, professional development-related, or not directly visible to students must demonstrate a clear connection to Student Health Center operations or student health service delivery.
- Health Service Fee funds must not be used for unrelated university operations, activities outside the authorized scope of the fee, or expenses that would conflict with Executive Order 943 or CSU student fee policy.
- Any salary savings, year-end balances, reserves, or carryforward balances must be reviewed and managed consistent with campus budget procedures and the authorized purpose of the fee.

References:

The following source policies and reference materials support these guidelines. Links are included for direct access to the specific policies and pages directly and indirectly referenced in this document.

- Policy on University Health Services Executive Order (EO) 943 URL:
<https://calstate.policystat.com/policy/12057598/latest>
- Policy on Student Mental Health Executive Order (EO) 1053 URL:
<https://calstate.policystat.com/policy/11384781/latest/#autoid-4edxb>
- Clarifications to Executive Order (EO) 943 Policy on University Health Services URL:
<https://calstate.policystat.com/policy/8590926/latest/>

- Student Tuition and Fee Policy (EO 1102) URL: <https://calstate.policystat.com/policy/16681992/latest/>
- Cal Poly Campus Health & Wellbeing, Access to Health Services. URL: <https://chw.calpoly.edu/health/access-to-health-services>
- Cal Poly Health Services URL: <https://chw.calpoly.edu/health/health-services>
- Cal Poly Student Health Advisory Committee. URL: <https://chw.calpoly.edu/shac>
- Cal Poly Student Health Advisory Committee Function. URL: <https://content-calpoly-edu.s3.amazonaws.com/president/1/documents/2025/Student%20Health%20Advisory%20Committee%20Function.pdf>
- Hospitality Policy URL: <https://calstate.policystat.com/policy/17548775/latest>
- CSU Payment Card Policy URL: <https://calstate.policystat.com/policy/19766773/latest>
- Travel and Business Expense Payments Policy URL: <https://calstate.policystat.com/policy/18816903/latest>
- Cal Poly Travel Policy URL: <https://afd.calpoly.edu/travel/policy/>
- Cal Poly Hospitality URL: <https://afd.calpoly.edu/procure-to-pay/how-to-buy/hospitality>
- Cal Poly How to Buy URL: <https://afd.calpoly.edu/procure-to-pay/how-to-buy/>
- Cal Poly Payment Card Policy and Procedures URL: <https://afd.calpoly.edu/procure-to-pay/how-to-pay/procard/>

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