Paying for College
or
“Money Matters”
Charges, Payments & Financial Aid

Get your questions answered on the essentials with representatives from Student Accounts and Financial Aid
Themes for Today …

• It’s All in Money Matters
  • Charges – What to Pay
  • Payments – When to Pay, Student Online Payment Access
  • Financial Aid

• The Student’s Account is the Student’s Account.
  • Let’s Make This Transition a Success

• Plenty of Time for Questions (after the presentation).
• We Are Here to Help
• Loads of information at …

SA.CalPoly.edu
SA.CalPoly.edu
Charges – What to Pay

Money Matters

• Charges are visible in Cal Poly Portal – Money Matters
• Check Money Matters Regularly
  • Make Every Monday a “Money Matters Monday”
• eMail communications (if used) go to the Student.

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Charges – What to Pay – Money Matters

TERM Charges (Registration & Other Fees)
Posted Each Quarter

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Charges – What to Pay – Money Matters

**Important Financial Dates**

- Registration-related Dates
  - Fall Quarter 2018
  - Registration Opens: 05/18/2018

**Extended Education**

Extended Education administers many graduate and off-campus programs. Registration dates and deadlines vary by class and program. Please visit the Extended Ed website for additional information.

**Campus Express or Gold Plate Meals**

- Go to My Account or Place Order

**Account Summary**

<table>
<thead>
<tr>
<th>Student Account Balance</th>
<th>Payments</th>
<th>Financial Aid</th>
</tr>
</thead>
<tbody>
<tr>
<td>Registration &amp; Other Fees</td>
<td>$6,341.62</td>
<td></td>
</tr>
<tr>
<td>Housing</td>
<td>$8,256.00</td>
<td></td>
</tr>
<tr>
<td>Dining</td>
<td>$4,168.00</td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>$18,765.00</strong></td>
<td></td>
</tr>
</tbody>
</table>

**Financial Aid & Scholarships**

- Cal Poly Scholarships now available
  - The My Apps ‘Cal Poly Scholarships’ link.

**Important Information**

- How to Apply
- Cost of Attendance
- Types of Aid

**Helpful Forms and Links**

- Authorization to Release Student Account and/or Financial Aid Information - FERPA
- Complete a Direct Parent

**View Payment Plan Installments**

**Make a Payment Now**

The CSU makes every effort to keep student costs to a minimum. Fees listed in published schedules or student accounts may need to be increased when public funding is inadequate. Therefore, CSU must reserve the right, even...

**SA.CalPoly.edu**
Charges – What to Pay – Money Matters

Important Financial Dates

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Cal Poly Scholarships now available through the My Apps 'Cal Poly Scholarships' Link.

- Financial Aid & Scholarships Website
- How to Apply
- Cost of Attendance
- Types of Aid
- Scholarship Information
- Financial Aid Forms
- Your EmpID (found on the ‘Personal Info’ tab) must be included on all documents sent to the Financial Aid Office.

Helpful Forms and Links

- Authorization to Release Student Account and/or Financial Aid Information - FERPA
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Line Item Details on Charges Here

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Charges – What to Pay – Money Matters

View Unpaid Charges Here

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Helpful Forms and Links
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Payments – When to Pay

Due Dates & Grace Periods

- Tuition & Registration Fees are Due when Posted
- Charges are visible in Cal Poly Portal – Money Matters
- There is always a grace period – no adverse action
- Having financial aid usually extends the grace period until the “disbursement date”
- Important dates are always visible at:

SA.CalPoly.edu
Payments – When to Pay

Welcome to Student Accounts

When to Pay

<table>
<thead>
<tr>
<th>Fall 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fees Viewable - Continuing Students</td>
</tr>
<tr>
<td>Fees Viewable - New Students</td>
</tr>
<tr>
<td>Fee Post Due Date</td>
</tr>
<tr>
<td>Class Cancellation</td>
</tr>
<tr>
<td>1st Financial Aid Disbursement</td>
</tr>
</tbody>
</table>

Pay Online

Students Pay Here

Parents Pay Here

Any online payments using a credit or debit card will incur a 2.75% non-refundable convenience fee.

SA.CalPoly.edu
Charges – When to Pay – Money Matters

Important Financial Dates

Registration-related Dates
Fall Quarter 2018
Registration Opens 05/18/2018

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Campus Express or Gold Plate Meals
Go to My Account or Place Order

Account Summary

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TOTAL $13,451.00

View Unpaid Charges Here

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Payments – When to Pay

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Payments – When to Pay

Payment Plan Payments & Due Dates

SA.CalPoly.edu
Payments – When to Pay

Financial Aid & Scholarships
Cal Poly Scholarships are available through the My Apps 'Cal Poly Scholarships' link.
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- How to Apply
- Cost of Attendance
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- Financial Aid Forms

Your EmpID (found on the 'Personal Info' tab) must be included on all documents sent to the Financial Aid Office.

Helpful Forms and Links
- Authorization to Release Student Account and/or Financial Aid Information
- FERPA
- Complete a Direct Parent

SA.CalPoly.edu
This means Financial Aid is extending the Grace Period until first disbursement.
Payments – When to Pay

<table>
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</thead>
<tbody>
<tr>
<td>Fall Quarter 2018</td>
<td></td>
<td>Financial Aid is NOT Subject to Cancellation</td>
</tr>
<tr>
<td>Registration Opens 05/18/2018</td>
<td></td>
<td></td>
</tr>
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**View Payment Plan Installment**

This means Financial Aid Will NOT pay your Housing

SA.CalPoly.edu
Payments – When to Pay

This first payment is due September 1st … but Financial Aid doesn’t disburse until 9/13.
Payments – When to Pay

![Financial Aid is paying your housing charges.](SA.CalPoly.edu)
Payments – How to Pay

Payments & the Parent PIN

• CASHNet Online Payments
  - Best way to Pay – Electronic Checks are Free!
  - Credit Card/Debit Card Payments are charged a non-refundable 2.75% fee
- Pay in Person – University Cashiers – Cash & Check Only
- Pay by Mail – Check Only
- FlyWire – International Students

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Payments – How to Pay - Student

Make a Payment Now

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Payments – How to Pay – Student/Parent

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Payments – How to Pay – Parent PIN

STUDENT ACCOUNTS

SA.CalPoly.edu

Parent PIN is Updated or Created Here
Payments – How to Pay

Payments & 529 Plans

• 529’s DO NOT Honor Electronic Check (ACH) Requests.
• Payments cannot be posted properly until charges have been posted to the account first.
• Allow 2-3 weeks for your 529 payments to be received.
• Best way (if allowed by 529) – Have your 529 send YOU the money and you pay with an electronic check.
Keys to Supporter-Student Success

#2 – Share My Info

*How Mustang Supporters can see what’s going on inside a Student Account*

- Student sets up supporter through “Share My Information” box on “Money Matters” tab of portal
- More info at “User Guides” tab of Student Accounts website.

SA.CalPoly.edu
Keys to Supporter-Student Success

#2 – Share My Info

The CSU makes every effort to keep student costs to a minimum. Fees listed in published schedules or student accounts may need to be increased when public funding is inadequate. Therefore, CSU must reserve the right, even after fees are initially charged or initial fee payments are made, to increase or modify any listed fees. All listed fees, other than mandatory systemwide fees, are subject to change without notice, until the date when instruction for a particular semester or quarter has begun. All CSU listed fees should be regarded as estimates that are subject to change upon approval by the Board of Trustees, the Chancellor, or the Presidents, as appropriate. Changes in mandatory systemwide fees will be made in accordance with the requirements of the Working Families Student Fee Transparency and Accountability Act (Sections 66028 - 66028.6 of the Education Code).

Why Share My Information?

• Give access to parents or others to view your student account or financial aid information
• Allow scholarship donors access to your financial and academic information

Create a New Report

SA.CalPoly.edu
Keys to Supporter-Student Success

#1 – FERPA

No FERPA Release = No Information for Parents/Supporters!

• One-page form MUST be signed by the student
• More information and the form on “Forms” tab of Student Accounts and Financial Aid website

financialaid.calpoly.edu
SA.CalPoly.edu
Student Accounts – Contact Us

SA.CalPoly.edu
805-756-1428 M-F 8am-5pm
Bldg. 1, Rm 211
Counter Hours M-F 8am-5pm
studentaccounts@calpoly.edu
Financial Aid – What should you be doing now?

• Check your To Do List
• Stafford Loans
  - accept loans on the portal (Money Matters tab)
  - complete tasks at studentloans.gov
• Parent PLUS Loan:
  - accept the loan on the portal
  - Apply for the loan at studentloans.gov.
• Direct Deposit
Financial Aid Disbursement & Refunds

NOTE: Receiving a financial aid refund does NOT mean that all of the student’s balance has been paid.

• Refunds Process
Paying for Housing and Dining – 3 Options

• **Financial Aid** – Pays for housing and/or dining quarterly only if there is sufficient aid to cover tuition, housing, and/or dining

• **Pay in full**: Payment window is August 4-15, 2018

• **Installment payment plan**: first payment due September 1, 2018
Financial Aid – Be Prepared

• Check your Email, Portal: To Do List and Holds & Warnings often
• Understand the Cost of Attendance (COA)
• Act in a Timely Manner

We are here all summer!
Financial Aid – Contact Us

financialaid.calpoly.edu
805-756-2927 M-Th 9am-12pm, 1pm-3pm
Bldg. 1, Rm 212
Counter Hours M-F 8am-5pm
Counselor Hours M-F 8am-5pm
financialaid@calpoly.edu