How to support your new Mustang student through the financial side of their university education.
In Today’s Overview

- Valuable Resources
- The One Important “Rule of the Road”
- Jerry Maguire Inspiration
- What to Pay, When to Pay and How to Pay charges
- Financial Aid
- Glossary of Special Words
- Mustang Supporter Punch List
Very Important Ground Rule

- It’s the **Student** Account
- The student is ultimately responsible
- The student owns the liability
- All communication is done through the student
- Primarily Via Cal Poly Portal and eMail
A Brief Interlude
Resources

Best General Resource
SA.CalPoly.edu
Welcome to Student Accounts

What to Pay

Charges are posted to the Student Account and visible to the student through their "Money Matters" tab and to supporters through "Share My Information" reports. Use the calculators below to plan for estimated costs for the year or how much Financial Aid you need to accept.

Fee Estimate Calculator

SA.CalPoly.edu

Financial Aid Deferral Calculator
Resources

Best General Resource
SA.CalPoly.edu

Student Account Info - Student Money Matters

- Check Money Matters Regularly
  - Make Every Monday a “Money Matters Monday”
- All Communications go to Student
  - Charges Viewable through Money Matters Tab
  - Financial Aid Accept/Decline in Money Matters
  - Financial Aid Disbursement, Registration Holds, Miscellaneous Charges are sent to the student by eMail.
Account Summary

Student Account Balance

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Registration &amp; Other Fees</td>
<td>$3,217.00</td>
</tr>
<tr>
<td>Housing</td>
<td>$9,747.00</td>
</tr>
<tr>
<td>Dining</td>
<td>$3,528.00</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>$16,492.00</strong></td>
</tr>
</tbody>
</table>

View Account Activity
View Unpaid Charges & Balances by Term

Registration and Tuition Fees are charged per quarter. Housing & Dining fees are charged annually.

For more info view HOW & WHEN TO PAY.

my.CalPoly.edu
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It’s The STUDENT Account
Resources

Best General Resource
SA.CalPoly.edu

Student Account Info - Student
Money Matters

Student Account Info - Parent
Share My Information
### Account & Payment Summary

#### Student Account Balance

<table>
<thead>
<tr>
<th>Item</th>
<th>Amount</th>
<th>Status</th>
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</thead>
<tbody>
<tr>
<td>Registration &amp; Other Fees</td>
<td>$3,217.00</td>
<td>Not Subject to Cancellation</td>
</tr>
<tr>
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<td>$3,528.00</td>
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</tr>
<tr>
<td>Extended Education</td>
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<td></td>
</tr>
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<td><strong>Total</strong></td>
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Resources

Best General Resource
SA.CalPoly.edu

Student Account Info - Student
Money Matters

Student Account Info - Parent

Share My Information

- Student Sets Up Report in Money Matters of Cal Poly Portal
- Shows similar information to Money Matters
Resources

Best General Resource  
SA.CalPoly.edu

Student Account Info - Student  
Money Matters

Student Account Info - Parent  
Share My Information

Still Have Questions?  
805-756-1428  
Monday – Friday | 8am-5pm
Family Educational Rights and Privacy Act
We are not able to respond to specific financial account questions without the student first providing us with their authorization and release of that information.

"Authorize to Release" link is in the Student Center of the Cal Poly portal (Personal Information).

You will need to know the access code the student has entered.
Your Next Steps

- Bookmark SA.CalPoly.edu
- It's the Student Account
- Check Money Matters Regularly
- Set Up “Share My Info”
- “Authorize to Release” - FERPA
What to Pay

Charges broken down into 3 “buckets”

- Registration & Other Fees
- Housing Charges
- Dining Charges

We communicate with the student when charges post to the account

- Mostly by eMail
- Except Registration/Tuition
Help Me
Help You
## Account & Payment Summary

<table>
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<td>Term</td>
<td>Account Type</td>
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<td>Fall 2019</td>
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<td>$3,481.00</td>
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<tr>
<td>Due Date</td>
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<td>Fall Quarter 2019</td>
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When to Pay

Dates posted on SA.CalPoly.edu

- Most Charges “Due” when posted
- Grace Period – 3 days to several weeks
- Past Due typically Results in a “Hold”
- We do not charge interest or late fees

Financial Aid extends Grace Period
When to Pay

Dates posted on SA.CalPoly.edu

- Most Charges “Due” when posted
- Grace Period – 3 days to several weeks
- Financial Aid extends Grace Period
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First Year Students – Fall 2019

- Registration/Tuition – Past Due 8/25
- With FA – Past Due 9/12
- Housing (year) – 1st Due Date – 9/1
- Dining (year) – 1st Due Date – 9/1
How to Pay

- Online
  - Electronic Check (free)
  - Credit/Debit Card (2.75% fee)
- In Person
  - University Cashiers Office
  - Cash or Check only
- Mail
  - Paper check only
  - No credit until received
  - Allow 2-3 weeks for 529 payments
- FlyWire (International Payments)
How to Pay

- Money Matters
  - “Make a Payment Now”
- SA.CalPoly.edu
  - “Students Pay Here”
It’s The STUDENT Account
How to Pay

- SA.CalPoly.edu
- "Students Pay Here"
- "Parents Pay Here"
- Use Parent "PIN" & password (set up by the Student)
How to Pay Financial Aid

Financial Aid Sequence

- Aid is “Offered”
- Aid is “Accepted”
- Free Money vs Loans
- Loan Types
  - Stafford (student)
    - Subsidized (Sub)
    - Unsubsidized (Unsub)
  - PLUS (parent)
How to Pay Financial Aid

Financial Aid Sequence

- Aid is “Offered”
- Aid is “Accepted”
- To-Do List Items Complete
  - Entrance Counseling
  - Master Promissory Notes
  - Verification
- Aid is “Disbursed”
  - One week before classes begin
How to Pay Financial Aid

How Financial Aid is Applied

- Registration & Other Fees First
  - Does not apply to some fees (lost room key, health center visit, etc.)
- Housing Balance
  - For that quarter only
- Dining Balance
  - For that quarter only
- Anything left is Refunded
Money Matters Terminology

- Financial Aid
  - Is Free Money AND Loans
- Deferral
- Grace Period
- Hold (registration)
- Disbursement
- Refund

(goofy words we use in Student Accounts)
Your Next Steps

- Now
  - Enjoy the zeros
  - Have the “Help Me Help You” conversation
  - Set Up “Share My Info”
  - “Authorize to Release”
  - Accept Financial Aid
  - Complete To-Do List Items

- August
  - Fees viewable the first week
  - No FA – Reg Fees Past Due 8/25

- September
  - Housing/Dining 1st installment
  - FA Disburses 9/12
  - Classes start 9/19
Student Accounts Office
Administration Building, Room 211
Monday – Friday, 8am – 5pm
805-756-1428
SA.CalPoly.edu