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:
**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 online 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 required 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):
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:

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:

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Account Activity
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View by

<table>
<thead>
<tr>
<th>From</th>
<th>To</th>
<th>All Terms</th>
</tr>
</thead>
<tbody>
<tr>
<td>02/19/2009</td>
<td>08/19/2009</td>
<td>All Terms</td>
</tr>
</tbody>
</table>

Transactions

<table>
<thead>
<tr>
<th>Posted Date</th>
<th>Item</th>
<th>Term</th>
<th>Charge</th>
<th>Payment</th>
<th>Refund</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/19/2009</td>
<td>64060504 Adj PCV Spr Rent</td>
<td>Spring Quarter 2010</td>
<td>1,941.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>08/19/2009</td>
<td>64060502 Adj PCV Wtr Rent</td>
<td>Winter Quarter 2010</td>
<td>2,089.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>08/19/2009</td>
<td>41000700 Non Ref Install Fee</td>
<td>Fall Quarter 2009</td>
<td>15.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>08/10/2009</td>
<td>90000008 Pymt Fall Reg</td>
<td>Fall Quarter 2009</td>
<td>224.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>08/10/2009</td>
<td>904500008 Pymt Apt Fall</td>
<td>Fall Quarter 2009</td>
<td>775.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>08/10/2009</td>
<td>904500008 Pymt Apt Fall</td>
<td>Fall Quarter 2009</td>
<td>850.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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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:

<table>
<thead>
<tr>
<th>Posted Date</th>
<th>Item</th>
<th>Term</th>
<th>Charges</th>
<th>Payment</th>
<th>Refund</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date of transaction</td>
<td>Brief item description</td>
<td>Affected term</td>
<td>Amounts charged: Reg fees* Housing Meals Etc.</td>
<td>Financial aid applied, or payments made by student, &amp; account adjustment entries</td>
<td>Financial aid or cash refunds given back to student</td>
</tr>
</tbody>
</table>

* 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:
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: