

## Student Accounts

### 2017/18 Financial Aid Deferral Worksheet for Continuing CA Residents

Below is a four step worksheet intended only as a means of general financial planning for potential charges to the student account. Eligibility to defer housing and dining charges is determined by the Student Accounts Office. All amounts are subject to change and should be used for informational purposes only.

#### Step 1 – Calculate Net Disbursable Financial Aid

2017/2018 Financial Aid Awarded & <b>Accepted</b> from student portal		\$	
Subtract Federal Work Study		-	
Subtract Non-disbursable Scholarships		-	
Subtract Non-disbursable other (waivers, athletic or RA housing)		-	
Equals Net Disbursable Financial Aid	A	\$	

If 'A' is greater than \$0, Registration and Tuition Fees are automatically deferred. \*

\*Notes: Confirm that Financial Aid is awarded to each term of 2017/2018. Terms with \$0 aid do not qualify for deferral. Automatic deferral applies to Registration and Tuition Fees only. See below for Housing and Dining requirements.

#### Step 2 – Compare Net Disbursable Financial Aid to Registration and Tuition Fees

2017/18 Estimated Registration and Tuition Fees		\$	9,436
College of Liberal Arts students: Subtract \$360		-	
Equals Total Estimated Registration and Tuition Fees	B	\$	
Subtract Net Disbursable Financial Aid (from Step 1 above)	A	\$	
Equals net due or (excess aid/credit) **	Subtract A from B	\$	

\*\*Notes: Any net due should be paid after each quarter's financial aid disbursement that occurs one week before the term begins. Excess aid/credit is either refunded or considered for deferral of other charges such as housing and dining. See below for housing and dining deferral requirements.

#### Step 3 – Compare Net Disbursable Financial Aid to Housing deferral requirements

Net Disbursable Financial Aid (from Step 1 above)		A	\$
Amount from table below-Select housing assignment and college			\$
Deduct authorized fee waivers & veteran benefits			-
Total required financial aid to defer Housing charges	C	\$	
Aid sufficient or (not sufficient) to defer housing	Subtract C from A	\$	

If 'A' greater than 'C', then housing charges may be deferred. If 'C' greater than 'A', then personal payment required for housing. Housing is paid either by financial aid OR personal payment, not a combination or mix of both.

Financial Aid Required for California Resident Students to Defer Housing Charges:

<b>Financial Aid required to defer: Registration and Tuition Fees AND Housing</b>	<b>Private Room</b>	<b>Shared Room</b>	<b>Double Suite Room</b>
All Colleges except Liberal Arts	\$19,018	\$17,101	\$15,568
College of Liberal Arts	\$18,658	\$16,741	\$15,208

Financial aid amounts required to defer were calculated based on the highest total quarterly charge (Fall quarter) multiplied by three terms. Housing and dining annual charges are not equally divided into three quarters, meaning that students will incur higher housing and dining charges during the Fall quarter based the longer occupancy period and other factors. It is important to note that Financial Aid is divided evenly over the three quarters. As a result, students that accept the amount of Financial Aid indicated above to defer housing or housing and dining can expect to have a small amount of excess Financial Aid in the Winter and Spring quarters that will be automatically refunded. The amounts do not factor in loan fees deducted by lenders and indicate the required 'net' financial aid.

For additional assistance, please contact the Student Accounts Office:

[studentaccounts@calpoly.edu](mailto:studentaccounts@calpoly.edu)

(805) 756-1428

Phone Hours: M-F 8am-5pm