

# Guidelines for Using Financial Aid to Pay Housing and Dining for 2017/18

Provided by Cal Poly's Student Accounts Office

[fees.calpoly.edu](http://fees.calpoly.edu)

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(805) 756-1428

Phone hours are M-F 8:00 a.m. to 5:00 p.m.

Counter hours are M-F 9:00 a.m. to 5:00 p.m.

## **Important Notice Regarding Fee Amounts**

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 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).

Steps to determining if the Financial  
Aid you have accepted is sufficient  
to cover Housing and Dining charges

# Step 1

How much Financial Aid (Grants and Loans) have you accepted?

- Visit your 'Financial Aid Award Summary' on your portal
  - [my.calpoly.edu](http://my.calpoly.edu) > Money Matters Tab > View My Financial Aid

# Important Notes

- Federal Work Study should not be included as part of total aid accepted for the academic year. Federal Work Study are not funds used to pay fees, but earned via paychecks from a qualified job.
- Non-Disbursable Scholarships should not be included as part of the total aid accepted. This is due to the fact that the funds are not yet received by Cal Poly or guaranteed by payment due dates. Further, outside scholarships may be sent to the student instead of the university, therefore not included in the calculation.
- Exceptions can be made for large outside scholarship amounts exceeding \$3,000. To be considered, Cal Poly must receive confirmation that the scholarship will be sent directly to Cal Poly and that the amount is guaranteed for the year.

# Step 2

## Decide

- Do I want to have my financial aid to cover only Housing charges?

Or

- Do I want my financial aid to cover both Housing and Dining charges?

# Helpful Worksheet

Please visit appropriate link below and print worksheet:

[Freshman CA Resident](#)

[Freshman Non-CA Resident](#)

[Transfer CA Resident](#)

[Transfer Non-CA Resident](#)

[Continuing CA Resident](#)

[Continuing Non-CA Resident](#)

Worksheets also available on Student Accounts webpage under User Guides.

Please visit <https://afd.calpoly.edu/student-accounts/>

The worksheet provided will assist in the calculations to follow.

# Are you a Non-California Resident Student? (Out of State)

- Please note, Non-Resident Students must add a 'Non-Resident Tuition' fee when calculating the Registration and Tuition Charges for the academic year.
- It is important to incorporate this fee when calculating the amount of financial aid required for the year.
- Non-Resident tuition fee is \$264 per unit. The Student Accounts Office uses 15 units per quarter (\$3,960) as a base.

# Step 3

- Compare total award accepted to thresholds established
- Use Financial Aid Deferral Worksheet printed in Step 2
- Threshold amounts for CA residents available at <https://afd.calpoly.edu/student-accounts/financial-aid/financial-aid-deferral>



# The Flow of Aid

Financial aid is always applied in the following order

- First - Registration and Tuition
  - Non-Resident students must add the non-resident tuition fee.
- Second - Housing
- Third – Dining

# Step 4

## Next Steps

A) If your Net Disbursable Financial Aid DOES meet the threshold to defer charges, no additional action is required. In August 2017 after annual housing and dining charges are posted, a message will be displayed in the 'Account Summary' portlet of the 'Money Matters' tab next to the balance due that confirms the deferral.

OR

B) If your Net Disbursable Financial Aid does NOT meet the threshold to defer charges either:

- Accept additional financial aid to meet the threshold desired by July 12, 2017.
- Choose not to accept additional aid and make a personal payment for the initial payment that was due at the time the contract was signed.
- If no additional aid is available and personal payment is not made by July 12<sup>th</sup>, your account will be charged the initial housing and/or dining amount. The charge will be considered due by July 12<sup>th</sup>, 2017.

# Questions?

Please contact Cal Poly's Student Accounts at:

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or (805) 756-1428

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