

# 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:

**Academics**

**Enrollment**  
[My Class Schedule](#)  
[Add a Class](#)  
[Drop a Class](#)  
[Priority Choice](#)

**Academic History**  
[Grades](#)  
[Degree Progress](#)

other academic... ▶▶

| Upcoming Schedule         |  |
|---------------------------|--|
| Class                     | Schedule   |
| EDUC 300-03<br>LEC (6251) | Th 5:10PM - 7:00PM<br>Cotchett Education 213       |
| EDUC 300-04<br>ACT (6252) | Location: TBA                                      |
| ENGL 303-01<br>LEC (2120) | TuTh 9:10AM - 11:00AM<br>English 0212              |
| ENGL 365-01<br>LEC (4564) | MoWe 5:40PM - 7:00PM<br>Frank E. Pilling 0253      |
| ENGL 365-02<br>ACT (5477) | Location: TBA                                      |
| ENGL 391-01<br>LEC (3832) | MoTuWeTh 2:10PM - 3:00PM<br>Cotchett Education 013 |

[weekly schedule ▶](#)

SEARCH FOR CLASSES

**Holds and Warnings**  
No Holds.

**To Do List**  
 09/10 Parent PLUS Loan  
 High School Transcript  
 Loan Rights & Responsibilities  
 Master Promissory Note-Par  
 Master Promissory Note-Stdtd  
[details ▶](#)

**Money Matters**  
[Financial Aid Information](#)  
[Fee and Payment Information](#)

**Dates, Deadlines & Other Info**  
[Calendars/Deadlines](#)

▼ Finances

**My Account**

- [Account Summary](#)
- [Make a Payment](#)
- [Direct Deposit](#)
- [1098T Detail Inquiry](#)
- [1098T Print Option](#)

**Financial Aid**

- [View Financial Aid](#)
- [Accept/Decline Awards](#)
- [Loan Counseling](#)

Account Balance

**You owe 152.00.**

|              |        |
|--------------|--------|
| ■ Due Now    | 152.00 |
| ■ Future Due | 0.00   |

[\\*Important Student Fee Information](#)

other financial... ▼ >>

▼ 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.

## ▼ Finances

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 on line 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):

**Account Balance**

**You owe 3,198.00.**

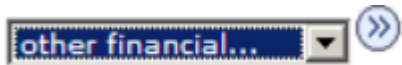
|              |          |
|--------------|----------|
| ■ Due Now    | 3,198.00 |
| ■ Future Due | 0.00     |

**\*\* You have a past due balance of 1,132.00. \*\***


OR

 **You have no outstanding charges at this time.**

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:**

## Account Activity

| View by   |  |                           |  |   |   |
|---|--|---------------------------|--|---|---|
| From  | 02/19/2009  | To                        | 08/19/2009  | All Terms  |  |
| Transactions <span style="float: right;">Find   View All</span> <span style="float: right;">First  1-10 of 38 </span> |  |                           |  |   |   |
| Posted Date   | Item   | Term                      | Charge   | Payment   | Refund  |
| 08/19/2009  | 64060504 Adj<br>PCV Spr Rent   | Spring<br>Quarter<br>2010 |  | 1,941.00  |   |
| 08/19/2009  | 64060502 Adj<br>PCV Wtr Rent   | Winter<br>Quarter<br>2010 |  | 2,089.00  |   |
| 08/19/2009  | 41000700 Non<br>Ref Install Fee C  | Fall<br>Quarter<br>2009   | 15.00  |   |   |
| 08/10/2009  | 90000008 Pymt<br>Fall Reg  | Fall<br>Quarter<br>2009   |  | 224.00  |   |
| 08/10/2009  | 90450008 Pymt<br>Apt Fall  | Fall<br>Quarter<br>2009   |  | 775.00  |   |
| 08/10/2009  | 90450008 Pymt<br>Apt Fall  | Fall<br>Quarter           |  | 850.00  |   |

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:

| Posted Date              | Item                        | Term               | Charge   | Payment   | Refund   |
|--------------------------|-----------------------------|--------------------|--|---|--|
| ▼<br>Date of transaction | ▼<br>Brief item description | ▼<br>Affected term | ▼<br>Amounts charged:<br>Reg fees*<br>Housing<br>Meals<br>Etc. | ▼<br>Financial aid applied, or payments made by student, & account adjustment entries | ▼<br>Financial aid or cash refunds given back to student |



\* 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:



EXAMPLE: PAYMENT HISTORY PAGE:

## Payment History

From   To  

| Posted Payments |                                 |             | Find   View All | First | 1-5 of 9 | Last |
|-----------------|---------------------------------|-------------|-----------------|-------|----------|------|
| Date Paid       | Payment Type                    | Paid Amount |                 |       |          |      |
| 08/19/2009      | 64060504<br>Adj PCV<br>Spr Rent | 1,941.00    |                 |       |          |      |
| 08/19/2009      | 64060502<br>Adj PCV<br>Wtr Rent | 2,089.00    |                 |       |          |      |
| 08/10/2009      | 90450008<br>Pymt Apt<br>Fall    | 775.00      |                 |       |          |      |
| 08/10/2009      | 90450008<br>Pymt Apt<br>Fall    | 850.00      |                 |       |          |      |
| 08/10/2009      | 90000008<br>Pymt Fall<br>Reg    | 224.00      |                 |       |          |      |

First 1-5 of 9 Last

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:

