

Understanding Your Student Account Information

Account Summary - Summary for All Terms

The Account Summary screen provides a summary of the student account balance. The current balance due is shown on the top line as the "Balance for all Accounts". This amount is the total of all charge and payment activity for all terms. In the example shown below, the student has a current balance due of \$1,450.00. The total due or overpaid is also shown for each term.

Please note: Credit balances and charges that were due on 6/30/06 will be shown as conversion entries in the Summer 2006 quarter. This includes housing payments made before July 1, 2006 for the Fall 2006 quarter. Payments made after July 1, 2006 as general payments on account, or for miscellaneous fees such as parking permits will be reflected in the quarter currently in session.

To view the account details for a specific term click on the term listed in blue. This will open the Account Summary for Term screen for the selected term.

This is your Current Balance

Home > SA Self Service > Learner Services > Finances > Account Summary [New Window](#)

Account Summary
Summary for all Terms

Student's Name
Cal Poly San Luis Obispo

Balance for all Accounts: 1,450.00 USD

Term	Institution	Balance
Fall Quarter 2006	Cal Poly	174.00 USD
Summer Quarter 2006	Cal Poly	-1,724.00

Click to see term activity summary

Account Summary - Summary for Term

This screen provides a summary of the account activity for the selected term. In the example below, the total due for the Fall Quarter is \$3,174.00 and the student has a financial aid award of \$5,681.00.

Please Note: Payments and credit balances from previous quarters are not included in the activity for this term, even though they may be applied to the charges due for this quarter. The current balance due can be viewed on the previous Account Summary for All Terms screen.

A breakdown of the totals can be viewed by clicking on the View Account Detail link. An itemization of the anticipated financial aid and the disbursement information for the quarter can be accessed through the View Anticipated Aid link.

The screenshot shows a web page titled "Account Summary - Summary for Term" for the "Fall Quarter 2006". The page displays a table of account activities for a student named "Cal Poly San Luis Obispo". The table includes rows for Charge Activity, Payment Activity, Financial Aid Activity, Anticipated Aid Activity, Admissions Deposit Activity, and Term Balance. The Term Balance is \$3,174.00 USD. There are two links: "View Anticipated Aid" and "View Account Detail". Annotations include red circles around "Fall Quarter 2006", "3,174.00", and both links. Arrows point from "Term selected" to the term, "Click for details" to the links, and "Balance for term selected" to the Term Balance.

Home > SA Self Service > Learner Services > Finances > Account Summary [New Window](#)

Account Summary

Summary for Term

Fall Quarter 2006 ← **Term selected**

Student's Name

Cal Poly San Luis Obispo

Charge Activity:	3,174.00 USD
Payment Activity:	0.00
Financial Aid Activity:	0.00
Anticipated Aid Activity:	-5,681.00
Admissions Deposit Activity:	0.00
Term Balance:	3,174.00 USD

Click for details

[View Anticipated Aid](#)

[View Account Detail](#)

Balance for term selected

[Return to Account Summary](#)

Account Summary – Account Detail for Term

The Account Detail for Term screen displays the activity detail for the selected term. See the following example and a description of each section listed below.

Charges

This section displays all of the charge activity on the student's account for the term. In the example shown below, the student has a housing charge of \$1,724.00 and registration fees totaling \$1,450.00. A description of the registration fees can be found at <http://www.fees.calpoly.edu/feedescriptions.htm>.

Please Note: Registration fees are due within 48 hours of enrolling, unless the student has an accepted financial aid award (listed as Anticipated Aid) or an approved third party arrangement. For additional information regarding the fee payment policy, please refer to http://www.afd.calpoly.edu/Student_Accounts/pmtsched.htm. Payments can be made online by eCheck or credit card at www.afd.calpoly.edu/Student_Accounts/onlinepayments.htm.

Payments Received

This section displays all of the payment activity that posted to the selected term. Payments made as general payments on account are posted to the quarter currently in session. If you made a payment and don't see it listed in the expected term, return to the Account Summary for All Terms page and review the other terms for payments posted.

Self Service Pending Payments

Not in use – this section will always be blank.

Financial Aid

This group box displays the financial aid that has been disbursed and posted to the student's account for the term. For additional financial aid information, please refer to the Financial Aid Self Service links on the Money Matters page in www.my.calpoly.edu.

Anticipated Aid

This section displays the anticipated financial aid for the selected term. Registration fees are automatically deferred if the accepted award includes grant, loan or scholarship aid. For additional financial aid information, please refer to the Financial Aid Self Service links on the Money Matters page in www.my.calpoly.edu.

Admissions Deposit Due

Not in use – this section will always be blank. Cal Poly does not require a deposit for admission, only an application fee when the application is submitted.

Refunds

This section displays all of the refunds posted to the student's account for the term. Refunds disbursed by direct deposit will show a status of "Sent to ePayment Servicer". If a check was printed and mailed the displayed status is "AP Interface Created".

Please Note: Financial aid refund checks are mailed to the mailing address, if the student has not signed up for direct deposit. Addresses can be reviewed and updated in the My Cal Poly Portal www.my.calpoly.edu on the Personal Information page. Students can sign up for direct deposit in the portal on the Money Matters page. Refunds from PLUS Loan funds in excess of Cal Poly charges will be sent to the parent unless the parent requests the refund be given to the student by completing a PLUS Borrower Authorization form which can be obtained from the Student Accounts Office web site http://www.afd.calpoly.edu/Student_Accounts/Forms/forms.htm.

Account Summary Account Detail for Term

Term selected

Fall Quarter 2006

As of Date 08/29/2006

Student's Name

Click for Cashier's address

For additional information, contact Student Accounts at (805) 756-1428

Or, visit the Student Accounts website at http://www.afd.calpoly.edu/student_accounts/default.htm

Cal Poly San Luis Obispo

[Send Payment To](#)

Charges

Date Posted	Item Description	Amount
08/03/2006	41000008 Res Hall Fall Rent	1,724.00 USD
08/09/2006	15100008 UU Fee	102.41
08/09/2006	14100008 ASI Fee	42.91
08/09/2006	15200008 UU Sports Fee	7.00
08/09/2006	16100008 Campus Id Card	2.49
08/09/2006	11200008 CP Academic Fee	56.08
08/09/2006	13100008 IRA General Fee	23.71
08/09/2006	14200008 ASI Athletic Fee	36.32
08/09/2006	13200008 IRA Athletics Fee	53.57
08/09/2006	12100008 Health Service Fee	51.02
08/09/2006	12200008 Health Facility Fee	2.49
08/09/2006	10100008 State University Fee	840.00
08/09/2006	11176008 College Acad. Fee-SCM	232.00

Registration Fees

Total Charges: 3,174.00 USD

Payments Received

Date Posted	Item Description	Amount
		0.00

Total Payments: 0.00 USD

Self Service Pending Payments

Reference Number	Card Number's Last Four Digits	Amount
		0.00

Total Pending Payments: 0.00 USD

Financial Aid

Date Posted	Item Description	Amount
		0.00

Total Financial Aid: 0.00 USD

Anticipated Aid

Item Description	Anticipated Aid
86002001 U Fed Unsub Staf Ln-1	-875.00 USD
86004501 F Parent PLUS Ln-1	-4,806.00
Total Anticipated Aid:	-5,681.00 USD

Financial Aid award for term

Admissions Deposit Due

Short Description	Academic Program	Due Amount
		0.00

Total Admissions Deposit: 0.00 USD

Refunds

Status	Method	Item Amount

Total Refunds: 0.00 USD

Term Balance: 3,174.00 USD

[Return to Term Summary](#)