Tuition Surcharge Guidelines

This guideline provides a framework for implementing a tuition surcharge on undergraduates as required by North Carolina General Statute § 116-143.7 as codified by Section 9.10(a) of Session Law 2009-451.

I. Surcharge

The Board of Governors of the University of North Carolina shall ensure that procedures are established that are necessary to impose a twenty-five percent (25%) tuition surcharge prior to the 2010-2011 academic year and a fifty percent (50%) tuition surcharge beginning with the 2010-2011 academic year on students who take more than 140 degree credit hours to complete a baccalaureate degree in a four-year program or more than one hundred ten percent (110%) of the credit hours necessary to complete a baccalaureate degree in any program officially designated by the Board of Governors as a five-year program. The calculation of the credit hours taken at the constituent institution or accepted for transfer shall include courses failed by the student or that are not completed unless officially dropped by the student pursuant to the academic policy of the appropriate institution. The calculation of the credit hours taken shall exclude hours earned through the College Board's Advanced Placement or CLEP examination, through institutional advanced placement or course validation, or through summer term or extension programs. No surcharge shall be imposed on any student who exceeds the degree credit hour limits within the equivalent of four academic years of regular term enrollment, or within five academic years of regular term enrollment in a degree program officially designated by the Board of Governors as a five-year program.

II. Waiver

Upon application by a student, the tuition surcharge shall be waived if the student demonstrates that any of the following have substantially disrupted or interrupted the student's pursuit of a degree: (i) a military service obligation, (ii) serious medical debilitation, (iii) a short-term or long-term disability, or (iv) other extraordinary hardship. (See Appendix A for the language and terms applicable to the waiver procedure).

III. Effective Date

Effective beginning with the 2009-2010 academic year, all undergraduates seeking a baccalaureate degree at a constituent institution will be subject to the requirements listed herein. Effective beginning with the 2010-2011 academic year, the tuition surcharge will be raised from 25% to 50%.

IV. "Counted Credit Hours"

The undergraduate credit hours to be counted for this requirement include: (1) those courses taken at the constituent institution or accepted for transfer, (2) failed courses, and (3) those courses not completed unless officially dropped by the student consistent with the academic policy of the appropriate constituent institution. All credit hours transferred shall be included for tuition surcharge calculation purposes regardless of their application to the student's major or minor, unless otherwise exempted consistent with this guideline. However, the following credit hours shall be excluded from the calculation: (1) those earned through the College Board's Advanced Placement (AP) and College Level Examination Program (CLEP) or similar programs, (2) those earned through institutional advanced placement, course validation, or any similar procedure for awarding course credit, and (3) those earned through summer session or extension programs on the campus or at another institution. In addition, and consistent with this guideline, credit hours taken while enrolled as a high school student shall be excluded from the tuition surcharge calculation.

V. Students Subject to the Surcharge

The surcharge shall be imposed on all counted credit hours in excess of the threshold defined below for each of the following three categories of undergraduates:

A. For students earning a first baccalaureate degree in a program that requires no more than 128 credit hours, the surcharge shall be applied to all counted credit hours in excess of 140.

B. For students earning a first baccalaureate degree in a board-approved program that requires more than 128 counted credit hours, the surcharge shall be applied to all credit hours that exceed 110 percent of the credit hours required for the degree. Such programs include those that have been officially designated by the Board of Governors as five-year programs, and combined bachelor's/master's degrees.

C. For students earning a baccalaureate degree other than their first, the surcharge shall be applied to all counted credit hours that exceed 110 percent of the minimum additional credit hours needed to earn the additional baccalaureate degree.

VI. Students Exempt from the Surcharge

The surcharge shall not be imposed on undergraduates who:

A. Complete a first baccalaureate degree program that has not been officially designated by the Board of Governors as a five-year program and whose counted credit hours were taken in eight (8) or fewer regular term semesters or the equivalent; or

B. Complete a first baccalaureate degree program that has been officially designated by the Board of Governors as a five-year program and whose counted credit hours were taken in ten (10) or fewer regular term semesters or the equivalent.

VII. How to Calculate the Surcharge

The surcharge shall be imposed on tuition charged in the current semester and in subsequent semesters where a student's cumulative credit hours total – with that semester's course load included – exceeds the threshold. The surcharge does not apply to required fees.

Appendix A*
Waiver Procedure

I. Definitions

With respect to the provisions of North Carolina General Statute § 116-143.7(c) the following terms are defined:

A. "Military Service Obligation" shall mean the performance of duty on a voluntary or involuntary basis in connection with service in the Armed Forces, Reserves, or National Guard including, but not limited to; active duty, active duty for training, initial active duty for training, and inactive duty training.

B. "Serious Medical Debilitation" shall mean an illness, injury, impairment, or physical or mental condition requiring; (a) inpatient care in a hospital, hospice, or residential medical care facility; or (b) continuing treatment by a health care provider; provided that such incapacity did not result from the student's violation of University policy or the commission of a felony.

C. "Disability" shall mean a mental or physical incapacity that causes the performance of the student's academic commitments to become impossible or impractical; provided that such incapacity did not result from the student's violation of University policy or the commission of a felony.

D. "Other Extraordinary Hardship" shall mean a hardship of any kind which, despite responsible handling, resulted in the substantial disruption or interruption of the student's pursuit of a degree.

II. Documentation Requirements

In order to demonstrate the applicability of a waiver category the student shall provide the following documentation:

A. Military Service Obligation: verification of the student's voluntary or involuntary performance of a duty in connection with service in the Armed Forces, Reserves, or National Guard including, but not limited to; active duty, active duty for training, initial active duty for training, and inactive duty training.

B. Serious Medical Debilitation

Certification issued by the treating health care professional(s) stating each of the following:

1. The approximate date on which the Serious Medical Debilitation commenced.

2. The extent to which the serious medical condition has impacted the student's pursuit of a degree.

3. The relevant and appropriate medical facts regarding the condition.

C. Short-Term Disability

Certification issued by the treating health care professional(s) stating each of the following:

1. The approximate date on which the Short-Term Disability commenced.

2. The extent to which the student's physical or mental incapacity has impacted the student's pursuit of a degree.

3. The relevant and appropriate medical facts regarding the condition.

**Note that this Appendix A - Waiver Procedure - is a part of New 1000.1.5[G] adopted 08/17/2010*

4. That, to the best of the treating health care professional's knowledge, the student's disability is not permanent.

D. Long-Term Disability

Certification issued by the treating health care professional stating each of the following:

1. The approximate date on which the Long-Term Disability commenced.

2. The extent to which the student's physical or mental incapacity has impacted the student's pursuit of a degree.

3. The relevant and appropriate medical facts regarding the condition.

4. That, to the best of the treating health care professional's knowledge, the student's disability is likely to be permanent.

E. Extraordinary Hardship: verification of any circumstances which, despite responsible handling, led to the substantial disruption or interruption of the student's pursuit of a degree.

III. Tuition Surcharge Waiver Process

A. Constituent Institution

A constituent institution shall:

1. Include with the student's bill that applies the tuition surcharge: (1) a tuition surcharge waiver form including, at a minimum, the information contained in Attachment 1, and (2) a copy of this guideline.

2. Establish procedures by which the institution shall receive each tuition surcharge waiver request.

3. Establish procedures by which the waiver request shall be reviewed and determined by a committee of no fewer than three (3) members, excluding initial decision makers when reasonably possible, drawn from departments whose expertise is relevant to the waiver category upon which the student's waiver request is based.

4. Establish procedures by which the student shall be informed of the institution's final decision within thirty (30) business days of receipt of the waiver request and Student Accounts shall be informed in a timely fashion.

B. Student

A student who wishes to request a tuition surcharge waiver shall:

1. Complete and submit a tuition surcharge waiver request form provided by the constituent campus, <u>and</u>

2. In a manner consistent with the UNC Policy Manual 1000.1.5 [G] including Appendix A, and to the satisfaction of the constituent institution:

a. Demonstrate that his/her pursuit of a degree has been substantially disrupted or interrupted <u>and</u> that the reason for such substantial disruption or interruption fits within one of the four waiver categories enumerated above and defined in Appendix A, <u>and</u>;

**Note that this Appendix A -Waiver Procedure - is a part of the New 1000.1.5[G] adopted 8/17/2010*

b. Meet the necessary documentation requirements that accompany each waiver category as articulated in Appendix A, and;

c. Successfully complete and submit the form to the institution within thirty (30) business days of receiving written notice of the tuition surcharge.

Written notification of the result of the waiver request shall be provided to the student within thirty (30) business days from the date of receipt by the institution. The determination of the institution shall be the final decision.

**Note that this Appendix A – Waiver Procedure – is a part of New 1000.1.5[G] adopted 08/17/2010.*

Attachment 1**

Minimum Content Required for the Tuition Surcharge Waiver Form

I. Student Information

A. Student's Name and Address

B. Student's Email Address

C. Student's Identification Number

D. Student's Major(s)/Degree Program

E. Other

II. Basis for Waiver Request

The following four waiver categories constitute the only grounds for waiver of the tuition surcharge (select one of the following):

A. Military Service Obligation

B. Serious Medical Debilitation

C. Short-term or Long-Term Disability

D. Other Extraordinary Hardship

III. Documentation Requirements

Attach to this form the necessary documentation requirements that correspond with the waiver category selected in section II. Documentation not included with this form will not be considered.

IV. Form Completion and Submission

Once this form has been timely completed in its entirety, including the necessary information and documents listed in sections I, II, and III, the form shall be submitted to the institution for consideration.

***Note that this Attachment 1 - Minimum Content Required for the Tuition Surcharge Waiver Form – is a part of New 1000.1.5[G]*