



## MEMORANDUM

**TO:** SUS Council of Academic Vice Presidents (CAVP)  
SUS Council of Administration/Finance Affairs (CAFA),

**CC:** SUS Council of Data Administrators (CODA),  
SUS Registrars and Admissions Directors

**FROM:** Tim Jones, Vice Chancellor, Finance and Administration/CFO  
Vikki Shirley, General Counsel

**DATE:** October 26, 2018

**RE:** Additional Guidance on Excess Hour Surcharge

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The purpose of this memorandum is to provide additional guidance regarding the calculation of the excess hour surcharge and accountability metric.

**Four Year Surcharge Refund.** During the 2018 Legislative session, section 1009.286, Florida Statutes, was amended to require a state university to refund excess hour surcharges up to 12 credit hours to any first-time-in-college (FTIC) student who completes a baccalaureate degree program within 4 years after his or her initial enrollment in a state university. Board staff interpret this language to include students who enter the State University System as an FTIC student and then transfer to another SUS institution and graduate in four years. (*Note: The Hours to Degree (HTD) data the Board office currently uses to calculate the 'Percentage of Baccalaureate Degrees Without Excess Credit Hours' accountability measure does not differentiate between students who start as FTIC and then transfer to, and graduate from, another SUS institution. The HTD submission will be revised to capture this information for the 2018-19 academic year.*)

Since the effective date of the amendment to section 1009.286 is July 1, 2018, the 4-year surcharge refund is not effective for students who graduated before this date. Consequently, any students who graduate within four years during a summer term that ended before July 1, are not eligible for the new surcharge refund. Conversely, any students who graduated within four years in a summer term that ended after July 1 are eligible for the refund.

Because the Board's Excess Hours accountability metric does not disaggregate summer terms into individual stand-alone terms and graduation data has already been reported and accepted by our data system, we will exclude all students who graduated in four years during the summer of 2018 (regardless of which summer term he or she attended) from the university's excess hour calculation. For implementation purposes, the Board staff will exclude from its calculation of the 2018-19 excess hour accountability metric those students who graduated in a summer term that ended prior to July 1, 2018, who would have met the statutory criteria for the new refund had they been eligible for the refund. We recognize this creates a dichotomy in the application of the surcharge refund, but because our data system does not disaggregate the summer terms into "mini-mesters", this is the most equitable approach for purposes of the calculating the metric while remaining consistent with the effective date of the statutory amendment.

**Threshold for Program Changes.** In addition to the above legislative change, this memo also clarifies that the excess hour determination shall be based on the degree program in which the student graduates. If a student changes degree programs, the excess hour threshold shall be adjusted to the new program's required hours. Pursuant to Board Regulation 7.002(1), the university shall establish regulation procedures for the implementation of this policy clarification. The university can determine how best to assist students in paying the surcharges associated with changes in major. The following examples highlight the three scenarios related to this guidance on excess hour thresholds.

(1) A student can change from a standard 120 hour program to a longer program. For example, if a student changes from a 120 hour program to a 130 hour program, then the excess hour threshold for that student changes from 132 to 143. This means the student would not begin to pay the excess hour surcharge until the student attempts their 144<sup>th</sup> credit hour.

(2) Alternatively, a student can change from a longer program to a shorter program. For example, if a student changes from a 130 hour program to a standard 120 hour program, then the excess hour threshold for that student changes from 143 to 132. This means the student would be liable for excess hour surcharge payments in their 133<sup>rd</sup> credit hour attempt. If the student had already exceeded the new threshold, then the student would need to pay the excess hour surcharge for any hours above the new threshold.

(3) There is no change to the excess hour threshold for a student who changes programs if both programs require 120 credit hours.

As always, we appreciate the opportunity to provide additional guidance. If you have any questions concerning the foregoing, please do not hesitate to contact us.

c: Marshall M. Criser III, Chancellor

Dr. Christy England, Vice Chancellor, Academic and Student Affairs

TJ/VS