

**University of California
Implementation Guidelines for
Cohort-Based Undergraduate Student Charges**

Background

This document provides guidance to University of California (UC) campuses and off-campus programs (e.g., the UC Education Abroad Program) regarding the assessment of base Tuition, the Student Services Fee, and Nonresident Supplemental Tuition to undergraduate students under the Tuition Stability Plan approved by the UC Board of Regents in July 2021.

General Provisions

A. Applicable Charges

1. Base Tuition, the Student Services Fee, and Nonresident Supplemental Tuition (“applicable charges”) will be assessed on a cohort basis for eligible students as described in these guidelines. There is no expectation that other University fees will be assessed on a cohort basis.

B. Eligible Students

1. Applicable charges will be assessed on a cohort basis to degree-seeking resident and nonresident undergraduates in State-supported programs who first enroll in the University (as freshmen or transfer students) in academic year 2022-23 or later.
2. Applicable charges for degree-seeking undergraduates who first enroll during summer will be assessed on a cohort basis starting the following fall.
3. For purposes of these guidelines, the term “degree-seeking undergraduates” includes second-baccalaureate students—i.e., students who have earned a bachelor’s degree and elect to pursue a second bachelor’s degree.¹

C. Determination of a Student’s Cohort

1. For purposes of assessing cohort-based charges, a student’s cohort will be based upon the academic year of the term in which a student first enrolls at UC as a degree-seeking undergraduate.
2. A student’s formal enrollment status is determined by the campus and may include thresholds such as inclusion in third-week census data. This enrollment status will serve as the basis for a student’s cohort determination.
3. For degree-seeking undergraduates who first enroll in summer, the cohort will be based upon the following fall term.

¹ Post-baccalaureate students, by contrast, pursue a course of study that does not result in a bachelor’s degree. For this reason, post-baccalaureate students are not eligible for cohort-based rates and will be assessed the same systemwide tuition/fee levels as graduate students.

Implementation Guidelines for Cohort-Based Undergraduate Student Charges

4. For second-baccalaureate students, the relevant term in which a student first enrolls corresponds to their current course of study, not that of their initial baccalaureate.
5. The responsibility to determine a student's cohort and applicable fee levels will belong to the Office of the Registrar at each campus.
6. Each campus will develop an appeals process that allows a student to request a reconsideration of the student's assigned cohort by an appropriate campus office.

D. Duration of Charges

1. The period for which a student remains eligible for cohort-based charges will start as of the fall term of the academic year in which the eligible student first enrolls and will expire at the end of the spring term six consecutive academic years later (inclusive of the first year). For example, students who first enroll in fall 2022 or spring 2023 will be eligible to retain their cohort-based rates through spring 2028.
2. Undergraduate students who do not complete their degree requirements within their six-year cohort period will automatically be assessed the oldest unexpired cohort rate² for each additional year required to graduate.
3. The adoption of cohort-based rates does not affect any University or campus-specific policies regarding the maximum number of terms that students may remain enrolled to complete their degree requirements.
4. For undergraduate students who are called to active duty in the United States military as a result of national emergency or as a result of mobilization of the reserve forces, including the National Guard, and reenroll at the University, the time remaining in their six-year cohort period will be extended by their total length of service. Students who are granted this extension and who do not complete their degree requirements within their extended cohort period will automatically be assessed the oldest unexpired cohort rate for each additional year required to graduate.
5. The UC Office of the President will provide guidance on other exceptional circumstances under which a campus may extend the six-year cohort period.

E. Continuing Students as of 2022-23

1. Degree-seeking undergraduate students (including intra-UC transfers) who were enrolled at the University in the 2021-22 academic year and continue to be enrolled in future years will be assessed the applicable 2021-22 Tuition, Student Services Fee, and Nonresident Supplemental Tuition levels until 2026-27. Continuing students who do not complete their

² The "oldest unexpired cohort rate" is defined as either the rate that applied to degree-seeking undergraduate students who first enrolled in the 2022-23 academic year or, starting in 2028-29, the rate that has been active for five academic years and will be valid for only one additional academic year. For example, undergraduate students who first enroll in academic year 2022-23 and require more than six academic years to complete their degrees would be assessed, in the academic year 2028-29, the applicable charges that applied to the undergraduate students who first enrolled in academic year 2023-24. Likewise, students who first enrolled in 2023-24 who require a seventh year (in academic year 2029-30) would be assessed the applicable charges that applied to the incoming cohort of undergraduates in 2024-25. (Between 2022-23 and 2026-27, the "oldest unexpired cohort rate" will be the 2021-22 rate.)

Implementation Guidelines for Cohort-Based Undergraduate Student Charges

degree requirements by 2026-27 will automatically be assessed the oldest unexpired cohort rate for each additional year required to graduate.

Special Student Categories

F. Degree-Seeking Undergraduate Students Who Return to the University

1. **Students Who Withdraw Before Academic Year 2022-23:** Degree-seeking undergraduate students who first officially matriculated at UC during or before academic year 2021-22, withdrew during or before 2021-22, and then obtain approval to reenroll at any UC campus during or after academic year 2022-23 will be assessed the oldest unexpired cohort rate that is active at the time of reenrollment. These students will continue to be assessed the oldest unexpired rate for each additional year needed to graduate.
2. **Students Who Withdraw During or After Academic Year 2022-23:** Degree-seeking undergraduate students who first officially matriculate during or after academic year 2022-23, withdraw (to attend a California Community College, for example), and then obtain approval to reenroll at any UC campus within their six-year window will retain their original cohort rate for the balance of the cohort period. Degree-seeking undergraduate students who first officially matriculate during or after academic year 2022-23, withdraw, and then obtain approval to reenroll at any UC campus after their six-year cohort period has expired will be assessed the oldest unexpired cohort rate that is active at the time of reenrollment. These students will be assessed the oldest unexpired rate for each additional year needed to graduate.

G. Intra-UC Transfers During and After Academic Year 2022-23

1. **For students within their six-year cohort period:** Degree-seeking undergraduate students who first matriculate at one UC campus during or after academic year 2022-23 and then transfer to another UC campus within their six-year cohort period will retain the cohort that they were assigned by the first UC campus for the balance of their cohort rate period.
2. **For students whose six-year cohort period has expired:** Degree-seeking undergraduate students who first matriculate at one UC campus during or after academic year 2022-23 and then transfer to another UC campus after their six-year cohort period has expired will be assessed the oldest unexpired cohort rate that is active as of the academic year of the transfer. These students will be assessed the oldest unexpired rate for each additional year needed to graduate.

H. Students Approved for Reduced Charges Due to Part-Time Enrollment

1. For students who qualify for reduced charges (i.e., Tuition and Nonresident Supplemental Tuition, if applicable) for approved part-time enrollment under the *Policy and Procedures Concerning Part-Time Study in the University of California*, the reduction to those charges will apply to whatever rate the student would have otherwise been assessed under these guidelines. Part-time enrollment does not affect the period of time for which a student remains eligible for cohort-based charges.

I. Financial Aid Recipients

1. Any differences in cohort-based charges will be treated the same way as differences in other student expenses (e.g. on- versus off-campus housing) when determining a student's financial aid award. In other words, undergraduate student financial aid packages will generally reflect the same level of self-help regardless of a student's cohort.
2. Provisions of the University's Blue and Gold Opportunity Plan will remain unchanged.

J. Summer Session

1. The University will continue to set a uniform per-unit rate for matriculated undergraduate students who enroll in summer session. This rate will be determined by the University of California Office of the President (UCOP) based on the cohort rates for base Tuition and the Student Services Fee that applied to entering students four years earlier (e.g., the summer 2026 rate would be based on the fall 2022 entering cohort rate).
2. Campuses will retain their existing authority both to offer summer session fee discounts relative to the uniform rate and to charge additional summer fees (consistent with campus and systemwide fee policies).
3. Within campus and systemwide policy guidelines, campuses will retain their existing authority to determine the return-to-aid rate relative to the uniform per-unit fees and may continue with their existing summer return-to-aid rates at their discretion.

K. Off-Campus Programs

1. Matriculated UC undergraduate students who enroll in the University's Education Abroad Program (EAP) will be assessed the same cohort rates that would have applied had they enrolled at their home campus.
2. Students enrolled in other State-supported off-campus programs that assess applicable charges, such as UCDC or UC Sacramento, will be assessed the same cohort rates that would have applied had they enrolled at their home campus.
3. Students enrolled in non-EAP study abroad programs that assess applicable charges will be assessed the same cohort rates that would have applied had they enrolled at their home campus.

L. Visitors

1. Degree-seeking undergraduate students who matriculate at UC and who participate in one of UC's Intercampus Visitor Programs will be assessed the cohort-based charges established by the campus at which they first matriculated (the "home" campus).
2. Visiting undergraduate students from institutions other than UC who are treated as matriculated students will be assessed the same applicable charges as students in the incoming cohort of that academic year and permitted to retain that cohort rate for the duration of their affiliated UC undergraduate program, not to exceed six years.
3. Non-matriculated visiting students who are enrolled in UC Extension or other non-matriculated student programs are not subject to cohort-based charges and will be assessed applicable program-specific charges.