

Army Regulation 621–202

Education

Army Educational Incentives and Entitlements

**Headquarters
Department of the Army
Washington, DC
8 February 2016**

UNCLASSIFIED

SUMMARY of CHANGE

AR 621-202

Army Educational Incentives and Entitlements

This major revision, dated 8 February 2016--

- o Reviews public laws that have amended the Montgomery GI Bill (chap 2).
- o Updates information on the history of and changes to the Army College Fund (chap 2).
- o Adds U.S. Army National Guard and the U.S. Army Reserve information for educational incentives and entitlements authorized by public law, to include policies, responsibilities, and procedures (chap 3).
- o Reviews public laws that have implemented the Post-9/11 GI Bill (chap 4).
- o Reviews public law that has amended the Loan Repayment Program (chap 5).
- o Includes revised information on eligibility requirements and counseling and processing paperwork for the Regular Army Loan Repayment Program (chap 5).
- o Updates information on Selected Reserve Health Professionals Loan Repayment (chap 8).
- o Updates information on Health Professional Stipend Programs (chap 9).
- o Updates information on Post-Vietnam Era Veterans Educational Assistance Program (chap 10).


Education

Army Educational Incentives and Entitlements

By Order of the Secretary of the Army:

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General, United States Army
Chief of Staff

Official:



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History. This publication is a major revision.

Summary. This regulation establishes a reference for educational incentives and entitlements authorized by public law. It provides Regular Army-unique and Reserve Army-unique policies, responsibilities, and procedures governing these educational benefits for Soldiers and former Soldiers of the Active and Reserve Army. Soldier henceforth, unless otherwise specified, refers to enlisted and officers.

Applicability. This regulation applies to the Active Army, the Army National Guard/Army National Guard of the United States, and the U.S. Army Reserve, unless otherwise stated.

Proponent and exception authority. The proponent of this regulation is the Deputy Chief of Staff, G–1. The proponent has the authority to approve exceptions or waivers to this regulation that are consistent with controlling law and regulations. The proponent may delegate this approval authority, in writing, to a division chief within the proponent agency or its direct reporting unit or field operating agency, in the grade of colonel or the civilian equivalent. Activities may request a waiver to this regulation by providing justification that includes a full analysis of the expected benefits and must include formal review by the activity's senior legal officer. All waiver requests will be endorsed by the commander or senior leader of the requesting activity and forwarded through their higher headquarters to the policy proponent. Refer to AR 25–30 for specific guidance.

Army internal control process. This regulation contains internal control provisions in accordance with AR 11–2 and

identifies key internal controls that must be evaluated (see appendix D).

Supplementation. Supplementation of this regulation and establishment of command and local forms are prohibited without prior approval from the Deputy Chief of Staff, G–1 (DAPE–MPA), Washington, DC 20310-0300.

Suggested improvements. Users are invited to send comments or suggested improvements on DA Form 2028 (Recommended Changes to Publications and Blank Forms) directly to the Deputy Chief of Staff, G–1 (AHRC–PDE–I) (Department 410), 1600 Spearhead Division Avenue, Fort Knox, KY 40122–5401.

Distribution. This regulation is available in electronic media only and is intended for command levels C, D, and E for the Active Army, the Army National Guard/Army National Guard of the United States, and the U.S. Army Reserve.

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Glossary

Chapter 1 Introduction

1–1. Purpose

This regulation prescribes Army-unique policies, responsibilities, and procedures for the administration of Veterans' education programs and education incentives authorized by law, as well as information on Title 38, United States Code, Chapter 30 (excluding Active Guard Reserve (AGR)) (38 USC Chapter 30), 38 USC Chapter 32, 38 USC Chapter 33, 10 USC Chapter 1606, and 10 USC Chapter 1607.

1–2. References

See appendix A.

1–3. Explanation of abbreviations and terms

See glossary.

1–4. Responsibilities

a. Chief of Public Affairs. The CPA will communicate maximum information concerning educational incentives and entitlements to Soldiers.

b. Chief, National Guard Bureau. The CNGB will be responsible for educational incentives and entitlements for the AGR and Army National Guard (ARNG) Soldiers.

c. Deputy Chief of Staff, G–1. The DCS, G–1 will establish policies and budget requirements for all education incentive programs.

(1) The Commanding General, U.S. Army Human Resources Command (CG, HRC) will—

(a) Be the functional proponent for programs listed in this regulation.

(b) Maintain pertinent data in the enlisted master file, officer master file, and Total Army Personnel Database for programs listed in this regulation.

(c) Provide the day-to-day management of the MGIB, Post-9/11 GI Bill, VEAP, ACF, LRP, and the Test Incentives Programs.

(d) Correct and verify education incentive and entitlement data identified as incorrect by the Army, the Defense Manpower Data Center (DMDC), or the Department of Veterans Affairs (DVA).

(e) Respond to inquiries pertaining to programs listed in this regulation from Army agencies, DMDC, DVA, DOD, financial institutions, individual Soldiers and Veterans, and Congress.

(f) Provide training and reference materials to the U.S. Army Recruiting Command (USAREC) and the U.S. Army Installation Management Command (IMCOM), on an as needed basis.

(g) Participate as an active member in the policy formulation process.

(2) The CG, U.S. Army Recruiting Command will—

(a) Ensure accuracy of educational incentive and entitlement program data initiated at the recruiting stations and the military entrance processing stations (MEPSs).

(b) Maintain the automated information and electronic delivery systems for passing information to IMCOM, U.S. Military Entrance Processing Command and the Personnel Information Systems Directorate, HRC.

(c) Answer inquiries and investigate allegations of recruiter improprieties and errors concerning educational enlistment incentives.

(d) Coordinate with HRC on all Army Continuing Education System (ACES)-related advertising before release.

(e) Ensure that recruiters and Army guidance counselors are thoroughly trained and knowledgeable about all educational incentive programs and procedures.

d. Deputy Chief of Staff, G–3/5/7. The DCS, G–3/5/7, through the CG, U.S. Army Cadet Command, will provide data on education program participants as requested in support of mission requirements.

e. Chief, Army Reserve. The CAR will be responsible for educational incentives and entitlements for the AGR and the U.S. Army Reserve (USAR) Soldiers.

f. The Surgeon General. TSG, through the Commandant, Academy of Health Sciences (AHS) will—

(1) Provide, in consultation with ACES, a standardized MGIB briefing to eligible MGIB enrollees.

(2) Provide monthly MGIB and LRP enrollment reports to the DCS, G–1.

g. Assistant Chief of Staff for Installation Management. The ACSIM will—

(1) ACSIM, through the Director, IMCOM, will—

(a) Develop, maintain, and provide, in consultation with ACES, a standardized MGIB briefing given at the reception battalions and officer basic courses (OBCs) to eligible MGIB enrollees.

(b) Train all ACES counselors on basic policies, procedures and Department of the Army (DA) guidance pertaining to education incentives topics, including the delivery and presentation of Post-9/11 GI Bill, MGIB, ACF, and LRP standardized benefits briefings.

- (c) Provide monthly MGIB and LRP enrollment reports to the DCS, G-1 and DCS, G-3/5/7.
- (2) Education Services Officers (ESOs) will—
 - (a) Maintain current educational benefits regulations and other related reference materials.
 - (b) Provide counseling on educational entitlements and requirements (including MGIB, Post-9/11 GI Bill, ACF, and LRP).
 - (c) Conduct educational benefits training sessions twice a year for the counseling staff.
 - (d) Conduct mandatory educational benefits counseling for all Soldiers separating from the Army as required by 10 USC 1142.
 - (e) Record the following counseling statement on DA Form 669 (Army Continuing Education System (ACES) Record) after completion of mandatory counseling: “In accordance with 10 USC 1142 (Mandatory Benefits Counseling), I have received individual counseling concerning my Veteran’s educational benefits.”
 - (f) Require each Soldier’s signature attesting to the receipt of counseling.
 - (g) Follow procedures outlined in AR 621-5 for disposition of DA Form 669 and other requirements, as applicable.
 - h. *The Judge Advocate General.* TJAG will provide, in consultation with ACES, a standardized MGIB briefing to eligible MGIB enrollees.
 - i. *Chief of Chaplains* The CCH will provide, in consultation with ACES, a standardized MGIB briefing to eligible MGIB enrollees.

Chapter 2

The Montgomery GI Bill, the Army College Fund, and Conversion - Regular Army

Section I

The Montgomery GI Bill

2-1. Authority

Public Law (PL) 98-525 established the MGIB, and 38 USC Chapter 30, provides guidance for this program. The law has been amended over the years by PLs 101-510, PLs 102-484, PLs 102-568, PLs 103-160, PLs 104-275, PLs 106-398, PLs 106-419, PLs 107-103, 107-107, and 107-14 (an amendment to PL 106-419) (see app A).

2-2. Objective

- a. To help readjust and restore lost educational opportunities for those individuals who served on active duty (AD) and interrupted their civilian careers.
- b. To promote the All Volunteer Force Program and the Total Force idea.

2-3. Eligibility

- a. Soldiers who—
 - (1) Entered AD for the first time after 30 June 1985.
 - (2) Entered AD for the first time as a 32 USC after 30 June 1985, or after 29 November 1989, as a 32 USC Soldier who meet the basic eligibility requirements listed in this paragraph, may be enrolled in MGIB-AD (38 USC Chapter 30). 32 USC soldiers who performed active duty between 30 June 1985 and 29 November 1989 who elected to receive coverage under 38 USC Chapter 30 within 9 months of 9 October 1996 are also eligible. RC Soldiers have 12 months after their release from active duty (REFRAD) date to enroll.
 - (3) Completed a qualifying term of service. Served 3 or more years of continuous AD if the obligated period of service was 3 or more years, or served 2 or more years of continuous AD if the obligated period of service was less than 3 years, or served 2 years continuous AD plus 4 years in the Selected Reserve (SELRES). Note: A qualifying term of service includes 32 USC Soldiers mobilized in support of a contingency operation, as defined in 10 USC 101(a)(13), for 2 or more years.
 - (4) Possess a high school diploma or an equivalency certificate before applying for benefits. An individual may meet this requirement by successfully completing the equivalent of 12 semester hours in an education program leading to a standard college degree.
 - (5) After completion of the qualifying service, the Soldier—
 - (a) Separates from AD with a fully honorable discharge; or
 - (b) Continues on AD.
- b. Exceptions to completing the first qualifying term of service are as follows:
 - (1) The Soldier has been discharged or released from AD for a service-connected disability, by reason of a sole survivorship discharge (as that term is defined in 10 USC 1174(i)), for a medical condition which pre-existed AD, for a physical or mental condition that interferes with duty that is not the result of the Soldier’s willful misconduct

(henceforth referred to as “condition interferes with duty), or for hardship. Individuals in this category will receive 1 month of benefits for each month of continuous AD served not to exceed 36 months.

(2) The Soldier has been discharged or released for the convenience of the Government (COG). The following is called the “20/30–Month Rule” and applies to COG discharges:

(a) Soldiers whose initial AD obligation is less than 3 years must complete at least 20 months of continuous AD.

(b) Soldiers whose initial AD obligation is 3 or more years must complete at least 30 months of continuous AD.

(3) Soldiers who are separated involuntarily for the COG because of a reduction-in-strength directed by the Secretary of the Army (SECARMY) have no minimum service requirement and may earn prorated benefits. Soldiers who meet the 20/30 Month Rule will qualify for 36 months of benefits, although any ACF entitlement will be prorated based upon time served. However, Soldiers involuntarily separated in a reduction-in-force (RIF) action with less than the 20/30 months of continuous AD will earn 1 month of benefits for every month served.

(4) Individuals separating prior to completing 12 months of their initial obligated period of service for hardship, service-connected disability, by reason of a sole survivorship discharge (as that term is defined in 10 USC 1174 (i)), nonservice connected disability that pre-existed service, condition interferes with duty or RIF and subsequently re-entering AD, may combine the two periods of service to qualify for full or increased educational benefits.

(a) Resumption of the pay reduction is required until the full \$1,200 payment has been completed.

(b) If the individual re-enters AD and disqualifies for any reason (for example, receipt of General Discharge, or failure to meet 20/30 Month Rule), the DVA will revert to the prior qualifying period of service, which would be 1 month of benefits for each month served.

(c) This subparagraph is retroactive to 1 July 1985, but only applies to training pursued after 1 October 1993.

(5) Individuals separating to attend a Service Academy, but who subsequently re-enter AD prior to graduation, may combine the two periods of service to qualify for educational benefits.

(a) Resumption of the pay reduction is required until the full \$1,200 payment has been completed if the individual served less than 1 year AD.

(b) The individual must meet the minimum time-in-service requirement at separation when combining both terms of service.

(c) This subparagraph is retroactive to 1 July 1985, but only applies to training pursued after 1 October 1993.

c. 38 USC 3012 provides an opportunity for Soldiers to increase their benefits or, if they failed to meet the in-service requirement, another opportunity to earn their education benefits. This is referred to as the 2 x 4 Program. Soldiers who complete their initial 2-year term of service obligation and contract with the ARNG or USAR within 1 year of separating from AD will become eligible to receive the MGIB at the higher 3-year term of service rate. If Soldiers fail to complete their initial term of service but complete 24 months of continuous AD, they may reestablish their MGIB eligibility by signing a 4-year contract with the ARNG or USAR. A 4-year ARNG or USAR commitment will entitle these individuals to 1 month of benefits for each month of AD and 1 month of benefits for every 4 months served in the ARNG or USAR.

d. Soldiers who do not complete the qualifying term of service and who do not qualify as an exception in paragraph 2–3b have no educational benefits and will not receive a refund of the \$1,200 reduction in pay.

e. Besides the mandatory separation counseling procedures outlined in AR 621–5, Soldiers requesting voluntary discharges must provide documentation of receipt of counseling and acknowledgment of their understanding regarding the status of their MGIB benefits to the separation approval authority.

(1) Soldiers requesting an early separation must be counseled regarding the time-in-service requirement for MGIB entitlement that is associated with the separation program designator code that the Soldier will receive.

(2) Soldiers requesting voluntary separations under AR 635–200 must receive counseling regarding the status of their MGIB benefits. This type of discharge is not classified as COG. Therefore, to be eligible to receive benefits the Soldier must completely serve 24 months of a less than 3-year term of service and at least 36 months of a 3-year or longer term of service. The provisions of the law grant full entitlement for MGIB once the individual has served 36 months. Therefore, the 4-year enlistee earns the MGIB after the first 36 months of continuous AD (ACF is earned by each month served; therefore, ACF will be prorated). (Note: Separations must be fully honorable.) In either case, the ESO, Education Services Specialist, or guidance counselor—

(a) Provides counseling to the Soldier with less than the time-in-service requirement.

(b) Informs the Soldier of the loss of educational benefits.

(c) Annotates the DA Form 669 with either one of the appropriate statements below:

1. I have been counseled on Veterans’ educational benefits in connection with my request for a voluntary separation. I understand that I am forfeiting all my educational entitlements under 38 USC Chapter 30, and I am not eligible to receive a refund of monies reduced from my base pay.

2. For the Soldier who enlisted for ACF, has met time-in-service requirements, but has not earned the entire ACF, the statement should read, “I have been counseled on my Veterans’ educational benefits in connection with my request for a voluntary separation. I understand that I have not earned my entire ACF; therefore, my ACF will be prorated.

(d) Requires Soldier to sign the counseling entry acknowledging this mandatory counseling.

(e) Provides the Soldier with a copy of that portion of the DA Form 669 containing the counseling entry so that it can be included in the separation request. Without this statement, the separation approval authority will not take final action on requests for voluntary separations from Soldiers who do not meet the time-in-service requirements.

2-4. Eligibility exclusions

a. Commissioned officers are not eligible for the MGIB if they—

(1) Received a commission in the Armed Forces upon graduation from the U.S. Military, Naval, Air Force, or Coast Guard Academies after 31 December 1976.

(2) Completed a program of educational assistance through an ROTC Scholarship (ROTCS) under 10 USC 2107, except that: PL 104-201 allows ROTCS graduates who entered AD as a commissioned officer after 30 September 1996, and received \$2,000 or less in any 1 school year under that program, to be entitled to the MGIB. PL 107-103 increases from \$2,000 to \$3,400 per year the amount a student under the Senior Reserve Officers' Training Corps (SROTC) may receive in scholarship assistance and still retain eligibility for the MGIB - AD (38 USC Chapter 30). This law applies to 38 USC Chapter 30 benefits paid for months beginning after 27 December 2001.

(3) All such officers will sign the appropriate section of DD Form 2366 (Montgomery GI Bill Act of 1984 (MGIB) Basic Enrollment), acknowledging their ineligibility for the MGIB, unless an exception applies.

(4) Officers outlined in this section who previously established MGIB eligibility as an enlisted Soldier will retain their eligibility after receipt of commission.

b. PL 106-419 repealed the requirement for establishing the initial obligated period of AD as the sole period of service that establishes MGIB eligibility. Presently, Soldiers who do not meet time in service requirements for the MGIB in their initial term of service can establish such eligibility by successfully and honorably completing 36 months in a subsequent qualifying term of service. Basic rules of eligibility as outlined in paragraph 2-3 still apply, and the choice of disenrollment, once made, is still irrevocable and cannot be changed even in subsequent periods of service.

c. Service that resulted in a separation due to an erroneous or defective enlistment is not considered part of a qualifying term of service.

d. Individuals who served in the RC who were on AD for training only are eligible to enroll in the MGIB if they meet eligibility outlined in paragraph 2-3.

2-5. Duration of eligibility

a. Usually, eligibility extends 10 years from the date of last discharge or REFRAD.

b. For those individuals with a break-in-service between 1 January 1977 and 30 June 1985, the 10-year period in which to use benefits will be reduced by the length of time the Soldier was not on AD during that timeframe.

2-6. Extension of eligibility

a. Veterans may receive an extension of the eligibility period if a physical or mental disability prevents them from initiating or completing their chosen program of education. The disability cannot be a result of their willful misconduct.

b. Extensions may be granted for the length that the disability prevented the Veteran from initiating or completing a program. Applicants may apply to the nearest Veteran Affairs Regional Office (VARO) for extensions.

2-7. Processing Montgomery GI Bill eligibles

Processing may take place at the MEPS, reception battalions, training bases, or first permanent duty stations. All eligible Soldiers are automatically enrolled in the MGIB, unless they choose to disenroll. The decision to disenroll must be made within 3 working days upon entry on AD. DD Form 2366 will be used for this purpose and will be stocked at MEPS, reception battalions, training bases, or first permanent duty stations.

a. USAREC—

(1) Ensures accuracy of DD Form 1966 (Record of Military Processing-Armed Forces of the United States), according to AR 601-210.

(2) Initiates DD Form 2366 (five copies) by completing items 1 and 2 for all Soldiers.

(3) Forwards DD Form 2366 to reception battalions with the accession packet.

b. IMCOM at the reception battalions and OBC—

(1) Provides the appropriate MGIB standardized incentives briefing to MGIB, ACF, and LRP eligibles.

(2) Completes DD Form 2366 as follows:

(a) For those remaining enrolled in the MGIB, distribute DD Form 2366 in accordance with paragraph 2-7f. Ensure items 1 and 2 are completed prior to distribution.

(b) Item 4 for those contracting for LRP or ACF. See chapter 4 for LRP guidance or section II of this chapter for ACF guidelines.

(c) Item 5 for those deciding to disenroll from the MGIB.

(d) Item 6 must be completed by the certifying official, who must be a civilian in grade general series (GS)-7 or military grade E-7, and above.

c. The chaplaincy and AHS—

(1) Provide the MGIB standardized briefing to MGIB eligibles except for those awarded the LRP or the ACF. (Army guidance counselors will complete the enrollment or disenrollment action for these Soldiers at the MEPS.)

(2) Complete DD Form 2366 as described in paragraph 2–7b.

d. The Defense Finance and Accounting Service (DFAS) will automatically reduce the basic pay by \$100 each month for the first full 12 months on all eligible AD Soldiers, unless the individual chooses to disenroll as indicated on DD Form 2366. MGIB enrollment is irrevocable and monthly reductions may not be stopped and are non-refundable. DFAS will input a stop GI BILL only when—

(1) Soldier declined benefits at entry by completing item 5, DD Form 2366.

(2) An administrative error has caused an erroneous reduction. DFAS will refund erroneous collections only when administrative errors have occurred. Examples are as follows:

(a) Enrollments of individuals with service prior to 1 July 2005.

(b) Enrollments of ROTC recipients and/or Service Academy graduates.

(c) Multiple collections of \$1,200.

(3) All exceptions to this policy must be granted by HRC (HRC–PDE–EI) or DCS, G–1 (DAPE–MPA).

e. Installation commanders at the first permanent duty station process Soldiers who have not initially processed at the MEPS or reception battalion, for example, Soldiers who have completed basic training (BT) and advanced individual training on Reserve status and in-process on AD at a first permanent duty station or Soldiers entering the OBC. During in-processing, commanders—

(1) Identify Soldiers not yet MGIB processed.

(2) Complete items 1 and 2 of DD Form 2366.

(3) Complete items 1, 2, and 5 for all individuals deciding to disenroll from the MGIB.

(4) Distribute DD Form 2366 in accordance with the procedures outlined in paragraph 2–7f. (Note: This process is solely for those Soldiers who did not process through normal channels. This is not a method to disenroll once the Soldier has enrolled.)

f. The following recipients are on the distribution list for DD Form 2366: reception battalions, IMCOM, permanent duty station, and commanders, when applicable. The distribution is as follows:

(1) The Army Military Human Resource Record, located in the interactive Personnel Electronic Records Management System (iPERMS).

(2) Local finance office.

(3) Electronic military personnel office.

g. Army National Guard (ARNG)—

(1) The ARNG MGIB support team is the sole authorized enrollment authority for ARNG AGR Soldiers who have not previously made an election for MGIB–AD. It is the responsibility of the MGIB support team to identify potentially eligible Soldiers, brief and counsel them on benefit options, and process their enrollment selection. All transactions between the MGIB support team and eligible Soldiers will be handled either via email (gibill@pec.ngb.army.mil) or via postal mail at Education Support Center addressed to Active Duty GI Bill, PO Box 46, Camp Robinson, North Little Rock, AR 72199–0001. Upon request, eligible Soldiers are to provide the following to the MGIB support team:

(a) Initial AGR orders.

(b) Completed DD Form 2366 with desired election.

(c) For those who chose to enroll, election of \$1,200 payment. Payment options include:

1. Lump sum payment of \$1,200.00 in the form of money order or cashier's check made payable to the U.S. Department of Treasury.

2. Allotments of \$100 each month for a full 12 months. Upon designation of this option the MGIB support team will coordinate the allotments directly with DFAS.

(2) Upon enrollment, the official DD Form 2366 along with proof of payment will be distributed to the Soldier, the Soldier's iPERMS file, and the Soldier's State education office. A copy will also remain on file in the individual Soldier's page in the Information Management and Reporting Center database.

2–8. Resolution of discrepancies

a. *Soldiers not offered Montgomery GI Bill upon entering active duty.* Determination of eligibility for enrollment of eligible Soldiers not previously afforded the opportunity to enroll is assigned to education center counselors at the Soldier's current installation. This includes all officers and enlisted Soldiers who entered AD after 30 June 1985. (Previous laws/guidance governing academy graduates and Reserve Officers' Training Corps Scholarship (ROTCS) recipients still apply.) Lack of a DD Form 2366 in the Soldier's OMPF is considered evidence that the Soldier was not counseled properly upon entering AD.

b. *Montgomery GI Bill finance issues.* DFAS will automatically enroll any Soldier entering AD for the first time through the reception station if a DD Form 2366 reflecting disenrollment is not received. All Soldiers enrolling or

disenrolling are required to have a DD Form 2366. However, DFAS automatically enrolls all Soldiers, they only take action on disenrollments. Anyone not automatically enrolled in the MGIB is a DFAS error. DFAS is responsible for correcting this error. The original DD Form 2366 is the primary evidence to support the Soldier's claim of an error in the enrollment/disenrollment process. The local finance office has the authority to correct these problems. Local finance offices unable to resolve this type of problem must be referred to Defense Finance and Accounting Service (DFAS)-Indianapolis Center, (DFAS-IN-FD), Indianapolis, IN 46249-0672.

2-9. Basic benefits

Benefits are payable for DVA-approved educational programs pursued on a full-time or equivalent part-time basis. The maximum number of months of benefits under MGIB is 36. PL 102-568 authorized annual increases to the MGIB based on the consumer price index. Changes may occur annually at the beginning of the FY. Duplication of benefits is prohibited, including:

a. A person who has been determined by the DVA to be entitled to educational assistance under the MGIB, but who is also eligible for educational assistance under a program listed below, may not receive assistance from both at the same time. In a manner prescribed by the DVA, the person will elect under which program they will receive educational assistance.

(1) Vocational Rehabilitation (38 USC Chapter 31).

(2) VEAP (38 USC Chapter 32).

(3) VEAP (38 USC Chapter 34). A Soldier entitled to educational assistance under the Vietnam Era GI Bill may not receive assistance under the MGIB before 1 January 1990.

(4) Educational Assistance Program for Members of the SELRES (MGIB, 10 USC Chapter 1606).

(5) Educational Assistance for Persons Enlisting for AD (DOD FY 1981 Educational Assistance Test Program (EATP), 10 USC Chapter 107).

(6) SLRP or Health Professional Loan Repayment Program (HPLRP). The law provides that a period of service counted for purposes of loan repayment of an educational loan may not also be counted for purposes of entitlement to educational assistance under the MGIB for AD service.

(7) Post 9/11 GI Bill (38 USC Chapter 3033)

b. There is a limitation of 48 months of benefits under any combination of DVA administered education benefit programs.

2-10. Public laws amending the Montgomery GI Bill

The MGIB Program has changed dramatically in recent years as a result of several new laws that pertain to Soldiers and Veterans. This trend towards greater and more frequent changes continues at the time of this publication. To obtain the most up-to-date rates as well as detailed information on all facets of education programs administered by DVA, review <http://www.benefits.va.gov/gibill/>.

a. PL 100-689 made the following additions and changes to the MGIB. It provides—

(1) Death benefits to certain survivors of MGIB participants who die while on AD for a service-connected reason (effective date: 1 July 1985). Beneficiaries must provide copies of death certificates and documentary evidence reflecting designated beneficiary information. This documentation must be sent to: Department of Veterans Affairs, PO Box 66830, St. Louis, MO 63166-6830. (Note: PL 102-568, enacted on 29 October 1992, provided that death benefits may be paid for a service-connected death within 1 year of separation.)

(2) Entitlements for MGIB Soldiers who separate as a result of pre-existing medical conditions and who do not meet time-in-service requirements. Effective date: 1 July 1985. Education benefits will be provided to these Veterans at the rate of 1 month of entitlement for each month of continuous AD served.

(3) Service under a defective or erroneous enlistment, or by individuals who are a minor shall not be considered part of an obligated period of active duty. Soldiers separated for these reasons may request a refund of MGIB reductions by forwarding a copy of DD Form 214 (Certificate of Release or Discharge from Active Duty), copy number 4, to Commander, U.S. Army Human Resources Command (HRC-PDE-I) (Department 410), 1600 Spearhead Division Avenue, Fort Knox, KY 40122-5401. (Note: Those separating for fraudulent entry are not eligible for a refund).

(4) Entitlement of MGIB Soldiers who separate involuntarily for COG because of a RIF, as determined by the SECARMY, and who do not meet time-in-service requirements, will be provided education benefits at the rate of 1 month of benefits for each month of continuous AD served, not to exceed 36 months.

(5) Payment for refresher and deficiency courses (effective date: 15 August 1989).

(6) Payment for tutorial assistance, benefits up to \$1,200 may be paid (effective date: 18 November 1988).

(7) Payment for cooperative training (effective date: 1 January 1989).

(8) A provision for the extension of the 10-year time limit (delimiting date) to use benefits in cases of chronic disabilities. Requests for extensions should be forwarded to the nearest VARO.

b. PL 101-510, made the following changes to the MGIB. It provides—

(1) An opportunity for certain involuntarily separated individuals to enroll in the MGIB. This opportunity is available to:

(a) MGIB-era Soldiers who previously elected not to participate or who were required either to decline enrollment or simply were not eligible for the MGIB at the time they entered AD (for example, LRP participants, ROTCS and Service Academy graduates).

(b) MGIB-era Soldiers who did participate but failed to meet the minimum time-in-service requirements.

(c) VEAP-era Soldiers (participants and non-participants). It is important to note that participants must request a refund of their VEAP contributions prior to receiving benefits under the MGIB. In no case will an individual be entitled to educational assistance under more than one program or allowed to receive assistance under two or more programs concurrently. Conversion to MGIB will include transfer of contracted VEAP Kickers.

(d) Vietnam-Era GI Bill Soldiers who do not meet the eligibility criteria for conversion.

(2) The eligibility criteria are as follows:

(a) Be on AD 30 September 1990. See paragraph 2–10a(3).

(b) Separate after 3 February 1991 for specified reasons identified by DOD (see AEC counselor for assistance).

(c) Receive a fully honorable discharge.

(d) If Chapter 32 of 38 USC-era and have basic pay reduced or pay a lump sum of \$1,200 prior to separation.

(e) If Chapter 30 of 38 USC-era and have pay reduced or pay a lump sum, based on number of months served, up to \$1,200.

(3) The eligibility criteria were amended by PL 103–160. The law extended the original 30 September 1990 date to 30 November 1993 and after. All other criteria originally outlined must be met.

c. PL 102–484, Section 4404, made the following changes to the MGIB. It provided—

(1) An opportunity to enroll in the MGIB to those individuals separating under the voluntary separation incentive (VSI) and special separation benefit (SSB) programs. This opportunity was available to:

(a) MGIB-era Soldiers who previously elected not to participate or who were required either to decline enrollment or simply were not eligible for the MGIB at the time they entered AD (for example, LRP participants, ROTCS and Service Academy graduates).

(b) MGIB-era Soldiers who did participate but failed to meet the minimum time-in-service requirements.

(c) VEAP-era Soldiers (participants and non-participants). VEAP participants must request a refund of their VEAP contributions prior to receiving benefits under the MGIB. In no case will an individual be entitled to educational assistance under more than one program or allowed to receive assistance under two or more programs concurrently. Conversion to MGIB will include transfer of contracted VEAP Kickers.

(d) Vietnam-Era GI Bill Soldiers who do not meet the eligibility criteria for conversion.

(2) The eligibility criteria were:

(a) Separate after 5 December 1991 with an approved VSI or SSB separation program designator code.

(b) Receive a fully honorable discharge.

(c) Have basic pay reduced by \$1,200 prior to separation.

(d) Section 571 of PL 106–398 established a 31 December 2001 termination date for VSI and SSB separations.

d. Section 106 of PL 104–275 made the following changes to the MGIB. It provided—

(1) An opportunity for certain VEAP participants to enroll in the MGIB (first VEAP to MGIB conversion opportunity). It was the intent of Congress that any Soldier meeting the criteria be offered the opportunity to receive MGIB. To be eligible a Soldier or Veteran must have been:

(a) On AD 9 October 1996.

(b) A VEAP participant who had contributions in their VEAP account as of 9 October 1996.

(c) Before applying for benefits, have completed requirements for a secondary school diploma (or equivalency certificate) or have successfully completed the equivalent of 12 semester hours in a program of education leading to a standard college degree.

(d) Made an irrevocable decision to enroll in the MGIB no later than 8 October 1997.

(e) Individual must have paid \$100 per month for 12 months through payroll reduction or made a lump-sum payment of the entire \$1,200. Note: DVA requires the full payment prior to authorizing benefits under the MGIB. The DVA will not authorize benefits to any individual while the \$1,200 is being reduced from pay. At the completion of the payroll reduction, the DVA will pay benefits under this law retroactive to date of election.

(2) That eligible Soldiers and Veterans were entitled to receive 36 months for full-time benefits provided the individual had not used more than 12 months of benefits under VEAP. Any VEAP months used, greater than 12, will be reduced from their 36-month entitlement. Note: Anyone using all of the benefits under VEAP prior to 9 October 1996 could not convert to the MGIB.

(3) This program was open to all U.S. Military Academy (USMA) (Service Academy) and ROTCS graduates, Section 903 of PL 96–342 (FY 1979 Incentive Test Program), Enlistment Bonus, and LRP participants who met

eligibility criteria for conversion. Note: Section 901 of PL 96-342 recipients were not eligible under the provisions of this law.

(4) Participants had to request a refund of VEAP funds prior to receiving benefits under the MGIB. In no case can an individual be entitled to educational assistance under more than one program or allowed to receive assistance under two or more programs concurrently. Conversion to MGIB includes the transfer of the unused portion of the contracted VEAP Kickers.

e. PL 106-419 made the following changes to the MGIB. It provides—

(1) An opportunity for certain VEAP participants to enroll in the MGIB (second VEAP to MGIB conversion opportunity). It was the intent of Congress that any Soldier meeting the criteria be offered the opportunity to receive MGIB. To be eligible a Soldier or Veteran must have:

(a) Served continuously on AD from 9 October 1996 through 1 April 2000.

(b) Been a VEAP participant on 9 October 1996. Note: Participants are defined as Soldiers who opened a VEAP account; participants do not require remaining contributions in their account to be eligible under this law.

(c) Before applying for benefits, have completed requirements for a secondary school diploma (or equivalency certificate) or have successfully completed the equivalent of 12 semester hours in a program of education leading to a standard college degree.

(d) Made an irrevocable decision to enroll in the MGIB no later than 31 October 2001 by receiving AEC counseling and signing DD Form 2366 for this law.

(e) Made a nonrefundable lump-sum payment of \$2,700 or had \$2,700 deducted from pay within 18 months of the date that the Soldier signed the DD Form 2366 electing to enroll in the MGIB.

(2) This program was open to all USMA (Service Academy) and ROTCS graduates, Section 903 of PL 96-342, (FY 1979 Incentive Test Program), Enlistment Bonus, and LRP participants who met eligibility criteria for conversion. Note: Section 901 of PL 96-342 recipients were not eligible under the provisions of this law.

(3) ARNG or USAR members serving on AD might have been eligible. Any questions concerning Reservists must be referred to their respective MGIB points of contact.

(4) A Soldier could have selected one of the following methods of payment:

(a) *Lump sum payment of \$2,700.* This is the preferred method of payment. Lump sum payment must be made no later than 18 months after DD Form 2366 is signed.

(b) *Pay deduction.* Soldier must contact local office representative to coordinate the amount of pay deduction. Although the payroll deduction is nonrefundable, it will reduce the Soldier's taxable income. The total of \$2,700 must be paid within 18 months after the DD Form 2366 is signed.

(c) *Pay deduction and lump sum options.* Soldiers may combine pay deduction and lump sum options to ensure the \$2,700 is paid within the required 18 months. The DVA has stated that Soldiers or Veterans will not be denied benefits when the required \$2,700 could not be fully collected within the 18-month timeframe due to administrative errors or delays caused by DFAS. Soldiers must maintain proof of full payment of the \$2,700, along with the DD Form 2366 enrollment document, as copies of these forms may be required by the DVA when the Soldier or Veteran applies in writing to the DVA for MGIB benefits. Soldiers who did not begin making payments during their 18-month window will not be granted any special consideration by DVA. Such Soldiers will forfeit all of the money they have contributed and they will have no entitlement to any Veterans' education program administered by DVA. Additionally, Soldiers will not be able to utilize any MGIB entitlement until the \$2,700 is paid in full. No refunds are authorized under the law.

(5) At the completion of the payroll deduction, the DVA will pay benefits retroactive to date of full payment of the \$2,700. To avoid any delay in establishing eligibility, lump sum is the preferred method of payment.

(a) An individual has 18 months from the date the DD Form 2366 is signed to complete a full payment of \$2,700.

(b) The local DFAS finance and accounting office (FAO) will be responsible for processing the individual's request for payroll deduction and request for lump sum.

(c) Policy and administrative guidance for local finance offices and associated requirements were distributed by DFAS, Indianapolis through FAO channels.

(d) Soldiers must retain copies of the DD Form 2366 and proof of payment (Leave and Earnings Statement, DD Form 1131 (Cash Collection Voucher)). This is necessary to resolve any discrepancies that may occur at a later date. These documents will be the Soldier's only evidence of eligibility. No other copies will be available through the DVA or Education Incentives Branch. Individuals may have to provide copies of these documents to the DVA or Education Incentives Branch if eligibility questions arise.

(6) Soldiers' VEAP accounts.

(a) After signing the DD Form 2366, Soldiers who currently have allotments going into their VEAP accounts must visit the servicing FAO to stop allotments. Soldiers who have contributions remaining in their VEAP accounts must ensure the finance officer signs Part III, VA Form 22-5281 (Application for Refund of Educational Contributions), before it is forwarded to the VARO for a VEAP refund.

(b) Soldiers who have zero balances in their VEAP accounts will have no education benefits from the date the DD Form 2366 is signed until the \$2,700 has been paid in full.

(7) Benefits.

(a) Eligible Soldiers will be entitled to receive 36 months of full-time benefits, provided they have not used more than 12 months of benefits under VEAP.

(b) Any VEAP benefits used in excess of 12 months will be reduced from the 36-month entitlement. For example, if a Soldier used 16 months of benefits under VEAP, he or she would have 32 months of benefits under MGIB. Under 38 USC 3695, an individual cannot use more than 48 months of entitlement when combining any two or more DVA education programs. Soldier's original 16 months used under VEAP are subtracted from 48, leaving 32 months. Since the maximum benefit under MGIB is 36 months, a Soldier can use up to 12 months under VEAP with no effect on MGIB.

(c) Conversion to MGIB will include transfer of unused portion of contracted VEAP Kickers.

f. PL 106-419, Section 104 made the following changes to the MGIB (effective 1 May 2001). It provides—

(1) An opportunity for certain MGIB eligible Soldiers to contribute up to \$600 for the purpose of enhancing basic MGIB benefits. To be eligible a Soldier must:

(a) Have entered AD on or after 1 July 1985.

(b) Maintain MGIB eligibility.

(c) Make a lump-sum payment up to \$600 and/or have monthly deductions in pay (must be in \$20 multiples) for up to 30 months. The maximum \$600 contribution would increase total basic MGIB benefits by \$5,400. MGIB benefits will increase by \$5 per month for 36 months for each \$20 contributed. Eligible Soldiers may contribute at any time while on AD.

(2) This program is not open to Soldiers who enrolled in the MGIB by reason of involuntary separation, who converted to MGIB from 38 USC Chapter 32 (VEAP) or 38 USC Chapter 34 (Vietnam Era GI Bill), or who enrolled during the open period from 1 December 1988 to 30 June 1989.

(3) USAR or ARNG members serving on AD may be eligible. Any questions concerning Reservists or Guardsmen must be referred to their respective MGIB points of contact.

(4) AEC responsibilities:

(a) Confirm MGIB eligibility by verifying Soldier's enrollment and eligibility for participation in the MGIB benefits enhancement opportunity.

(b) Prepare a DD Form 2366-1 (Montgomery GI Bill Act of 1984 (MGIB), Increased Benefit Contribution Program). The DD Form 2366-1 will provide the local finance office with a Soldier's required eligibility documentation for the enhanced MGIB benefit. Soldiers must hand carry the DD Form 2366-1 to their local finance office and make specific arrangements for lump sum contributions or monthly pay deductions.

(c) Coordinate with local finance office officials and inform them of program requirements.

(d) Provide Soldiers with a copy of the DD Form 2366-1. Instruct Soldiers to safeguard the DD Form 2366-1 and proof of payment, since a copy will be required by the DVA when the Soldiers make claims for benefits.

(5) Payment.

(a) Payment is nonrefundable, this cannot be waived; it is law. Soldiers may make payment at any time while serving on AD. Payment can be made simultaneously with the reduction in pay for basic MGIB during the first year on AD (\$100/month for 12 months). Since the payments are nonrefundable, recommend that Soldiers contribute toward the \$600 after meeting the basic MGIB eligibility (completion of the initial term of service with a fully honorable character of service discharge or reenlist after meeting the requirements of the 20/30-Month Rule).

(b) Methods of payment.

1. *Lump-sum payment of \$600.* Soldiers on AD must contact their local finance office to make a lump-sum payment. Soldiers must ensure a cash collection voucher is received and maintained in a safe place, as they will be required to provide a copy to the DVA when applying for MGIB benefits.

2. *Pay deduction.* Soldiers must contact their local finance office to coordinate the pay deduction (DD Form 2558 (Authorization to Start, Stop, or Change an Allotment)). A minimum of \$20 is required. Pay deduction may be stopped or started as the Soldier desires. Pay deduction does not reduce taxes.

3. *Pay deduction and lump sum options.* Soldiers may combine pay deduction and lump sum options to ensure that the \$600 is paid. The election to participate in the MGIB enhancement opportunity and all payments must be made while the eligible Soldier is still on AD. No refunds are authorized under the law.

(c) The DVA will pay benefits as of the first day following the beginning of the school term.

(d) The local finance office is responsible for processing Soldier's requests for payroll deduction (DD Form 2558) and requests for lump-sum payment (DD Form 1131).

(e) Policy and administrative guidance for local finance offices and associated requirements are distributed by DFAS-Indianapolis.

(6) Benefits.

- (a) The MGIB benefit will increase by \$5 per month for 36 months for each \$20 contributed. For example, if a Soldier contributes the maximum \$600 additional amount, the basic MGIB benefit will increase by \$150 per month.
- (b) The ACF is not affected by the additional contribution.
- (7) Soldiers in a terminal/transitional leave status who desire to pay the required \$1,200 basic MGIB reduction-in-pay in a lump sum payment and/or desire to pay the required extra \$600 for the MGIB enhancement option in a lump sum payment must take the following actions:
- (a) Soldiers who have out-processed from their last duty stations must contact the closest education center to verify eligibility and obtain the required DD Form 2366-1.
- (b) The completed DD Form 2366-1 and lump sum payment (for example cashier's check, money order, or cash) should be hand carried by the Soldier to the finance office closest to his or her home for processing.
- (c) Should the Soldier experience any difficulties with the processing at the finance office, or if there is no finance office close to their home, the Soldier should forward all documentation (including the completed DD Form 2366-1 and a cashier's check and/or money order for processing) to Disbursing Officer, Defense Finance Accounting Service, IN/ADCABB/IO, Treasury OPS/COLL TEAM, 8899 East 56th Street, Indianapolis, IN 46249-8640.
- g. PL 106-419, Section 122, made the following changes to the MGIB:
- (1) It authorizes use of MGIB entitlement for the purpose of covering the cost of approved licensure and certification exams that are used to demonstrate an "individual's possession of the knowledge or skill required to enter into, maintain, or advance in employment in a predetermined and identified vocation or profession."
- (2) Up to \$2000 of an individual's entitlement is available for each approved license and/or certification test. Payment for approved tests occurs even if the individual does not pass the test. Retests will also be paid.
- (3) Once an individual receives MGIB payment(s) for such tests or certificates that equal the prevailing basic MGIB monthly full-time rate the individual would receive as a Veteran, that individual will have his or her remaining MGIB entitlement account reduced by 1 month's worth of benefits. Prorated entitlement reduction would also apply for amounts that do not equate exactly to whole months.
- h. PL 106-398, Floyd D. Spence National Defense Authorization Act (NDAA) for FY 2001 and PL 107-14 (amendment to PL 106-398), Veterans' Survivor Benefits Improvement Act of 2001 for tuition assistance (TA) 'Top-Up', made the following changes to the MGIB. It provides:
- (1) An opportunity for Soldiers using MGIB to TA Top-Up. This law allows the military services to pay up to 100 percent of the tuition and expenses charged by a school, up to the limits established by the DOD. If the tuition and expenses are more than the amount Army pays, Soldiers eligible for MGIB benefits can elect to receive MGIB benefits for all or part of the remaining expenses. The add-on payment is called "Top-Up" and is in effect for terms since 30 October 2000.
- (2) The TA Top-Up benefit is available only to persons eligible for 38 USC Chapter 30 (MGIB). Although USAR and ARNG components also offer TA, there is no Top-Up provision for 10 USC Chapter 1606 (MGIB-SR Educational Assistance Program) recipients. A member of the USAR or ARNG eligible to receive 38 USC Chapter 30 (MGIB) benefits who is receiving TA from the Active Army (in AGR status), USAR, or ARNG is eligible for TA Top-Up.
- (3) Soldiers who have not previously filed a claim for MGIB should do the following to claim benefits:
- (a) Request TA at the servicing AEC. Guidance counselors will issue DA Form 2171 (Request for Tuition Assistance - Army Continuing Education System (ACES)) in accordance with AR 621-5 and Headquarters, Department of the Army (HQDA) guidance. Approving officials, for example, commander and ESO, must approve and sign the DA Form 2171.
- (b) Complete VA Form 22-1990 (Application for VA Education Benefits). The AEC guidance counselors will assist Soldiers in completing the VA Form 22-1990. The form is available from the DVA Web site at <http://www.benefits.va.gov/gibill/>.
- (c) Send the approved DA Form 2171 (DVA will accept a photocopy) along with the VA Form 22-1990 to the DVA regional processing office with jurisdiction for the claim. The address is included in the general instructions of VA Form 22-1990.
- (4) Soldiers who have previously filed a claim for MGIB, and were not denied benefits, should simply submit a copy of their approved TA to the DVA.
- (5) VA Form 22-1999 (VA Enrollment Certification). The DVA will routinely accept the information pertaining to the name of program, training time, enrollment dates, and charges for tuition and fees as shown on approved DA Forms 2171.
- (a) Soldiers will not need to check for approval of the program for DVA benefits; approval is not an issue because Top-Up is an add-on to a DOD benefit.
- (b) The DVA will determine a Soldier's eligibility for the MGIB. If the Soldier is eligible for the MGIB, the approved DA Form 2171 establishes eligibility for Top-Up.
- (6) Soldiers can only use Top-Up for a total of 36 months while on AD. These months of Top-Up eligibility are strictly calendar based and are counted from the time that a Soldier is enrolled in courses for which Top-Up will be claimed until the term for such courses ends. Course load has no bearing on Top-Up months of eligibility. Furthermore,

1 month of remaining MGIB entitlement under 38 USC Chapter 30 is reduced when the Soldier's Top-Up dollars received equals the current monthly benefit the Soldier would normally be entitled to as a Veteran. For example, if a Soldier who is entitled to a full-time Veteran's rate of \$900 per month for 36 months of 38 USC Chapter 30 benefits had received a total of \$1800 in Top-Up dollars, then that Soldier would use/lose 2 months of MGIB entitlement. That Soldier would have 34 months of remaining MGIB entitlement rather than the full 36 months. Since the law is retroactive to 30 October 2000, Soldiers who have applied for Top-Up prior to enactment of PL 107-14 will have their accounts recomputed when they next apply to the DVA for Top-Up benefits.

(7) Soldiers should carefully consider their situations before applying for top-up. If they plan to take additional training after being discharged from AD, they need to understand the effect that using top-up will have on their remaining MGIB entitlement.

(8) Top-Up can apply retroactively to training already received but only for training in terms that began on or after 30 October 2000. Soldiers who converted VEAP to MGIB in 2001 and who have paid the required \$2,700 for MGIB enrollment are eligible for Top-Up benefits retroactive to the date of payment of the full \$2,700.

i. PL 107-103. Key provisions of this law include the following:

(1) Authorization for a Soldier or Veteran to receive accelerated lump sum MGIB payments in cases where the individual is enrolled in an approved course or program that will lead to "employment in a high technology industry" and the cost of the tuition and fees are greater than 200 percent of the prevailing monthly basic MGIB rate. DVA is responsible for defining "high technology industry."

(2) Expanding situations in which MGIB is approved for independent study programs. Previously, DVA only approved use of MGIB entitlement for independent study courses in instances in which such courses were part of an accredited program "leading to a standard college degree program." The new law expanded authorization of MGIB payment for independent study in situations in which courses lead to a "certificate that reflects educational attainment offered by an institution of higher learning."

2-11. In-service use eligibility

Soldiers must complete 24 months of continuous AD before becoming eligible to receive in-service benefits under the MGIB and ACF, if eligible. While on AD, the amount of educational assistance will be the rate as a Veteran or the established institutional charges for tuition and fees, whichever is less.

2-12. Application for benefits

Applicants—

- a. Go to the AEC for counseling.
- b. Complete VA Form 22-1990 (available at <http://www.benefits.va.gov/gibill/>).
- c. Go to the AEC for ESO's signature on VA Form 22-1990.
- d. Forward VA Form 22-1990 to appropriate VARO listed below.

(1) *Eastern Region.* Veterans Administration Regional Office, PO Box 4616, Buffalo, NY 14240-4616.

(2) *Southern Region.* Veterans Administration Regional Office, PO Box 10022, Decatur, GA 30031-7022.

(3) *Central Region.* Veterans Administration Regional Office, PO Box 66830, St. Louis, MO 63166-6830.

(4) *Western Region.* Veterans Administration Regional Office, PO Box 8888, Muskogee, OK 74402-8888. Note: Veterans will complete VA Form 22-1990 and apply through VARO.

Section II

The Army College Fund

2-13. Authority

Title 38 USC Chapter 30 authorizes the ACF, which must be used in conjunction with the MGIB.

2-14. Objective

- a. To aid in the recruitment of highly qualified Soldiers.
- b. To increase Test Score Category I-III accessions in entry-level skills.

2-15. Eligibility

Enlisted Soldiers—

- a. Meet and maintain eligibility requirements for and enroll in the MGIB.
- b. Have the ACF included in the enlistment contract.
- c. Have an Armed Forces Qualification Test (AFQT) score that meets eligibility criteria at time of enlistment.
- d. Qualify as a high school diploma graduate per AR 601-210 before entry on AD. There are three ways to enlist as a high school diploma graduate. An individual has—

(1) Attended and completed a 12-year or grade day school of classroom instruction. The diploma must be issued from the school where the individual completed all of the program requirements.

(2) Attended and completed an adult education or external diploma program. The diploma must have been issued as a result of attendance and not issued solely on the basis of a test.

(3) Attended a college or university and successfully completed at least 15 semester hours or 22 quarter hours of college level work or has attended a post secondary institution and completed 675 clock hours of a vocational program. Although this individual qualifies as a high school diploma graduate for enlistment, this Soldier must complete the requirements for a secondary school diploma or equivalency before applying to DVA for the MGIB/ACF.

e. Enlist in a critical skill military occupational specialty (MOS) that has been designated for the ACF program. Refer to DCS, G-1 messages for MOS changes.

2-16. Earning the Army College Fund

The ACF—

a. Term of enlistment is determined by the most recent HQDA Incentives Message (DAPE-MPA).

b. Accrues at a monthly rate until the Soldier has earned the maximum benefit. Soldiers must remain qualified in the MOS for which they enlisted during initial term of service.

c. Is not available to officers.

2-17. Maximum monthly benefits

a. Soldiers entering AD prior to 1 April 1993 will receive the ACF amount stated in their enlistment contracts. Soldiers entering AD on or after 1 April 1993 will receive not less than the consolidated MGIB and ACF benefit amount as indicated in their enlistment contract.

b. Further ACF clarification: Since 1 April 1993, the MGIB and ACF amounts have been presented or advertised as a combined enlistment incentive package. It is an incentive that includes the basic MGIB plus an additional stipend or Kicker that when added together is equal to the full ACF amount in the contract. For contracts written prior to 1 October 2004, in instances where Congress raised the basic Government Issue (GI) Bill stipend, the impact of the ACF suffered since the MGIB plus ACF amount was still capped at the level listed in the contract, and the MGIB amount alone eventually exceeded the ACF amount. Contracts issued prior to 1 October 2004 were subject to a DOD-imposed cap that in most cases negated further Kickers.

c. All Soldiers and/or Veterans claiming to have the ACF should be advised to provide the DVA with a copy of their DA Form 3286 (Statements for Enlistment, United States Army Enlistment Program, U.S. Army Delayed Enlistment Program) (Annex B or DEP OUT), when they apply in writing for benefits determination using VA Form 22-1990. DA Form 3286 (Annex B or DEP OUT) is used as official documentation to determine ACF entitlement.

2-18. Expiration of benefits (delimiting date)

Generally, eligibility extends 10 years from the date of last discharge or REFRAD. See paragraph 2-5 for exception.

2-19. Army College Fund eligibility exclusions

a. Eligibility for the ACF will be relinquished when a Soldier—

(1) Does not satisfy AD requirements for the MGIB.

(2) Fails to qualify in the MOS enlisted for that carried the ACF as an enlistment education incentive option.

(3) Fails to remain qualified for the MOS.

(4) Requests and receives another MOS during first term of service.

(5) Accepts either a warrant officer (WO) appointment or commission during first enlistment. Officer will remain eligible for the MGIB and the amount of ACF earned as an enlisted Soldier will be prorated.

b. HQDA-directed MOS reclassification does not disqualify the Soldier for the ACF.

2-20. Processing Army College Fund eligibles

For specific enlistment procedures, refer to AR 601-210.

a. USAREC—

(1) Ensures accuracy of DD Form 1966/1 per AR 601-210.

(2) Ensures ACF procedures are listed on DD Form 1966/4, Section VI - Remarks.

(3) Completes items 1 on the DD Form 2366.

(4) Annotates item 4.

(5) Annotates on DA Form 3286 (Annex B or DEP OUT) that the Soldier has selected the ACF as an enlistment incentive option. The total amount reflected on DA Form 3286 (Annex B or DEP OUT) is the combined benefits for MGIB and ACF.

(6) Forwards copies of both forms with the accession packet to the reception battalion.

b. IMCOM, AHS, and the chaplaincy—

(1) Exclude ACF eligibles (those required to remain enrolled in the MGIB to qualify for the ACF) from the MGIB standardized briefing.

(2) Distribute DD Form 2366 per paragraph 2–7f.

Section III

Conversion of Chapter 34 (Vietnam Era GI Bill) Eligibles to the Montgomery GI Bill

2–21. Authority

a. 38 USC Chapter 34 authorizes the Veterans' Educational Assistance (Vietnam Era GI Bill).

b. PL 98–525 authorized the conversion of the Vietnam Era GI Bill to the MGIB, which entitles eligible individuals to benefits under 38 USC Chapter 30.

2–22. Entitlements

38 USC Chapter 34 eligibles may receive the basic benefit under the MGIB, plus half of what their monthly 38 USC Chapter 34 benefit would have been as of 31 December 1989. These benefits became available on 1 January 1990 and are payable for 36 months or the number of months remaining of 38 USC Chapter 34 benefits as of 31 December 1989, whichever is less. Maximum number of months of combined total benefits cannot exceed 48.

2–23. Eligibility for original entitlement

a. Chapter 34 conversion is available to any Veteran or Soldier who served on AD for more than 180 continuous days. Any part of the AD must have occurred after 31 January 1955 and before 1 January 1977. In addition, the Veteran or Soldier must have been—

(1) Released under conditions other than dishonorable.

(2) Continued on AD.

(3) Discharged under other than dishonorable conditions with less than 181 continuous days of AD due to a service-connected disability.

b. Soldiers and Veterans who entered AD under the Delayed Entry Program must have: entered into such an agreement before 1 January 1977, been assigned to a RC at the time, and began serving on AD on or before 2 January 1978.

c. The required 181 continuous days on AD does not include any period that the individual—

(1) Was assigned as a full-time student by the Armed Forces to a civilian institution.

(2) Served as a cadet at a Service Academy.

(3) Served on AD for training as a member of the RC.

2–24. Eligibility for conversion from the Vietnam Era GI Bill to the Montgomery GI Bill

a. Soldiers are eligible for conversion if they fall into either paragraph (1) or (2).

(1) Entered on AD prior to 1 January 1977 or before 2 January 1978 under a delayed enlistment contract that was signed before 1 January 1977. The Soldier must also have had remaining Vietnam Era GI Bill 38 USC Chapter 34 entitlement on 31 December 1989. The Soldier must have been on AD at least 1 day between 19 October 1984 and 1 July 1985 and served continuously from 1 July 1985 until 30 June 1988. Contact DVA counselor for information on certain early out time in service and Reserve affiliation requirement exceptions. The Soldier is not eligible if commissioned after 31 December 1976 based on an ROTCS or Service Academy graduation. The 10-year delimiting date to use MGIB benefits is reduced by the time that the Soldier was not on AD between 1 January 1977 and 30 June 1985.

(2) PL 107–103 states that a Soldier must have had remaining Vietnam Era MGIB entitlement on 31 December 1989 and must not have been on AD on 19 October 1984, and serves at least 3 years of continuous AD service on or after 1 July 1985. Contact DVA counselor for information on certain early out time in service and Reserve affiliation requirement exceptions. The Soldier is not eligible if commissioned after 31 December 1976 based on an ROTCS or Service Academy graduation. The 10-year delimiting date is reduced by the time the individual was not on AD between 1 January 1977 and 30 June 1985.

b. Eligible Soldiers must have—

(1) Been discharged with an honorable discharge.

(2) Continued AD.

(3) Completed requirements for a high school diploma or equivalency certificate before 31 December 1989 or completed 12 semester hours in a program leading to a standard college degree.

c. Documentation requirements include the following

(1) During the mandatory pre-separation counseling, all Soldiers who are eligible for conversion should be advised that they will need to provide to DVA documentation that verifies service during the conversion periods. When applying for benefits, Veterans should provide a copy of the relevant documents from their OMPF, along with copies of all DD Forms 214.

(2) If Veterans wish to use benefits within 6 months of separation, they should either print out a copy of their OMPF using their Army Knowledge Online (AKO) account or order a copy of their OMPF through their personnel command channels prior to actual REFRAD.

2–25. Conversion of benefits

Determination of eligibility and amount of benefit are the responsibility of the DVA. Contact the DVA for information on conversion benefits.

2–26. Expiration of benefits (delimiting date)

Usually, all entitlements will expire 10 years after last discharge or REFRAD. See paragraph 2–5 for exception.

2–27. Application for benefits

Soldiers—

- a. Go to the AEC for counseling.
- b. Complete VA Form 22–1990 (available at <http://www.benefits.va.gov/gibill/>).
- c. Obtain the signature of the ESO on VA Form 22–1990.
- d. Forward VA Form 22–1990 to the nearest VARO. Note: Veterans will complete VA Form 22–1990 and forward to nearest VARO. Veterans are encouraged to provide the VARO with a copy of their DD Form 214.

Chapter 3

Montgomery GI Bill Selected Reserve, Montgomery GI Bill - Selected Reserve Kicker and Reserve Education Assistance Program

Section I

Montgomery GI Bill-Selected Reserve

3–1. General

a. This entitlement is codified in 10 USC Chapter 1606, regulated by the Secretary of Defense and administrated by the Secretary of Veterans Affairs. This chapter provides the Army National Guard of the United States (ARNGUS) and the USAR with guidance and procedures necessary to support the educational assistance program in compliance with DOD and DVA regulations.

b. The respective Reserve Component (RC) determines eligibility for the MGIB–SR, not the DVA. The DVA makes the payments for the program and publishes various guides to assist the Soldier’s educational goals. The DVA does not make decisions about basic eligibility and cannot pay benefits without eligibility information from the USAR or ARNG.

3–2. Purpose

a. The MGIB–SR is an education program that provides up to 36 months of benefits to members of the SELRES. This includes the Army, Navy, Air Force, Marine Corps, and Coast Guard Reserves, as well as the ARNG and the Air National Guard.

b. An eligible Reservist may get education benefits while in a program approved for DVA education and training. For information about the types of education and training available, visit the DVA at <http://www.benefits.va.gov/gibill/>.

3–3. Scope

a. Congress enacted the MGIB–SR to encourage membership in units of the SELRES of the Ready Reserve. It provides educational assistance to officers, WOs, and enlisted Soldiers of the SELRES, other than those serving in an AGR status, who agree to remain members of the SELRES for a period of not less than 6 years.

b. In determining MGIB–SR entitlement under this chapter, the SELRES of the Ready Reserve includes units of the ARNGUS, troop program units (TPUs) of the USAR, and individual Soldiers assigned under the Individual Mobilization Augmentee (IMA) Program.

c. Excluded from entitlement under this chapter are SELRES Soldiers serving in an AGR status per AR 135–18.

3–4. Eligibility

a. A Soldier is eligible for educational assistance under the MGIB–SR when they meets all of the following requirements: Enlists, reenlists, or extends an enlistment as a Reserve of the Army for service in the SELRES after 30 June 1985, and signs at least a 6-year obligation to serve in the SELRES (see para 3–3a).

b. Completes initial active duty for training (IADT) (for example BT, and advanced individual training (does not apply to officers or WOs). IADT is defined as the period required to qualify in the selected MOS, or training sufficient to be deployed; non-prior service (NPS) enlisted personnel will be ordered to IADT for the required period to become

qualified in basic Soldiering skills and in the MOS for which enlisted. Soldiers who complete basic training and are awarded an MOS under the Army Civilian Acquired Skills Program or through on the job training are considered to have completed IADT and are eligible for MGIB–SR.

c. Obtains a high school diploma by completing the requirements of a secondary school diploma or general education diploma prior to completion of IADT. In the case of a Soldier—

d. Currently in service, or having previous military service (for example prior service (PS)), the Soldier must have completed these educational requirements before enlisting, reenlisting, or extending a current enlistment.

e. Remain in good standing in a drilling SELRES unit (for example satisfactory participation).

f. Is appointed, or is serving, as a Reserve officer or WO (if applicable) and agrees to serve in the SELRES for a period of not less than 6 years. The officer's 6-year obligation must be in addition to any other period of obligated service in the SELRES. If a commissioned officer or WO initially establishes MGIB–SR (10 USC Chapter 1606) eligibility as an enlisted Soldier and subsequently voluntarily elects to become a commissioned or WO, the Soldier needs to sign a DA Form 5447 (Officer Service Agreement - Selected Reserve Educational Assistance Program) in order to continue to receive MGIB–SR 10 USC Chapter 1606 entitlements.

g. Is not receiving financial (scholarship) assistance under 10 USC 2107 as a member of the ROTC Program. A Soldier who gained entitlement to educational assistance under the MGIB retains such entitlement on conversion to ROTC (nonscholarship) cadet status and participation in the ROTC Simultaneous Membership Program (SMP). If one receives an ROTCS under 10 USC 2107a, then they may still be eligible for the MGIB–SR. Individuals receiving a scholarship under 10 USC 2107a agree to serve as officers in either the USAR or ARNG.

h. Service academy graduates who do not receive a commission.

i. Is not serving on full-time AD or full-time National Guard duty in AGR status. A Soldier entering on AGR status who gained entitlement under the MGIB–SR after 28 November 1989 and before 30 June 2008 and prior to entry on AGR status may retain entitlement for that portion of SELRES service not performed in an AGR status (see para 3–5). The period of service performed in an AGR status may not be credited toward entitlement under MGIB–SR.

j. Has been issued a DD Form 2384–1 (Notice of Basic Eligibility (NOBE)).

3–5. Restrictions

a. Eligibility is restricted if—

(1) The Soldier elects to use the Montgomery GI Bill - Active Duty (MGIB–AD) 2 x 4 Program, where total service in the SELRES is credited toward establishment of eligibility under the MGIB–AD 2 x 4 Program. The 2 x 4 Program allows an individual to become eligible for the MGIB - AD with 2 continuous years of AD and a 4-year SELRES obligation. The Soldier must enter the SELRES within 1 year of REFRAD. However, if the Soldier obligates another 6 years in the SELRES, they may be eligible for both the MGIB–AD and the MGIB–SR.

(2) The Soldier is an unsatisfactory participant (see para 3–4e).

(3) The Soldier is receiving a SROTC program scholarship. They cannot receive MGIB–SR while receiving a scholarship through the SROTC program under 10 USC 2107. Individuals receiving this type of ROTCS agree to serve as officers on AD in the Army, Navy, Air Force, or Marine Corps.

(4) Service academy graduates who receive a commission.

b. Other restrictions are: the Soldier cannot receive MGIB–SR benefits as TA Top-Up, if receiving TA under the military program. Top-up pays the remaining expenses that TA does not cover. Top-up is payable only under the MGIB–AD. Additional Top-Up information is available at <http://www.benefits.va.gov/gibill/>.

3–6. Suspension and restoration of entitlement.

Suspension and restoration of entitlement for MGIB–SR educational assistance applies to all MGIB–SR education benefits and MGIB–SR Kicker education incentives. The period of entitlement to educational assistance may be suspended and restored when:

a. The Service member is granted one authorized period of absence and may either transfer within his or her Military Service to the Individual Ready Reserve, the Inactive National Guard, or the Standby Reserve, or may transfer to the Selected Reserve of another RC, except as cited in paragraph 4d of this enclosure. Entitlement will be restored when the Service member reaffiliates in the Selected Reserve, before the end of a 3-year period for a religious missionary obligation or a 1-year period for all other circumstances. The required period of service will be adjusted by the amount of satisfactory service previously completed to total 6 years.

b. The Service member with a date of MGIB–SR basic entitlement after November 28, 1989, and before June 30, 2008, enters either AD or full-time National Guard duty (FTNGD) as an Active Guard and Reserve (AGR) member in accordance with DODI 1215.06 (Reference (i)). Entitlement will be restored provided the Service member commits within 1 year of release from the AD or FTNGD as an AGR to serve in the Selected Reserve for a period that, with time already served for entitlement of the Service member to MGIB–SR education entitlements benefits in accordance with this instruction, must be equal to or greater than 6 years.

3-7. Required statement of understanding

a. On assignment to the Selected Reserve, each Soldier will—

(1) Complete DA Form 5435 (Statement of Understanding - Selected Reserve Montgomery GI Bill) (10 USC Chapter 1606). The CNGB; CAR; CG, USAREC; U.S. Army Human Resources Command, Fort Knox, KY (AHRC-PDE-I) (for IMA Soldiers only); area commands; Joint Force Headquarters; and subordinate commands will ensure prompt completion of this statement following assignment to the SELRES regardless of eligibility status. DA Form 5435 explains eligibility requirements for entitlement under the MGIB-SR and ensures the Soldier's understanding of these requirements and entitlements is a matter of record.

(2) Upload the completed DA Form 5435 into iPERMS, OMPF and AMHRR.

b. For AGR and IMA Soldiers, a copy will be sent directly to Commander, U.S. Army Human Resource Command, Fort Knox, KY (HRC-PDE-I (Department 410), 1600 Spearhead Division Avenue, Fort Knox, KY 40122-5401. For TPU members, forward additional questions through channels to Commander, Army Reserve G-1, (AFRC-PRT-R), 4700 Knox Street, Fort Bragg, NC 28310-5010.

c. For ARNG Soldiers, a copy will be sent directly to their respective State/territory incentive manager. Forward additional questions through channels to Chief, National Guard Bureau, (ARNG-GSE-E), 111 South George Mason Drive, Arlington, VA 22204-1382.

3-8. Service agreements

a. The authority and the procedures necessary to satisfy the contractual service obligation required for MGIB-SR eligibility are for the following:

(1) By enlisting, reenlisting, or extending a current enlistment. If enlisting, reenlisting, or extending a current enlistment, the service agreement must contain a contractual obligation to serve in the SELRES for a term of not less than 6 years on or after 1 July 1985 (see para 3-4).

(2) An applicant having no previous military service will be processed for the 6X2 or 8X0 enlistment options as prescribed by AR 601-210.

(3) An applicant having previous military service will be processed for enlistment with assignment to the SELRES. Refer to AR 601-210 or AR 601-280, as appropriate.

(4) A current member of the SELRES will be processed for retention in the SELRES by reenlistment, or the extension of an enlistment, in accordance with AR 140-111 or NGR-ARH Policy Memorandum 09-026, as appropriate.

b. By completing DA Form 5447 an officer or WO incurs a contractual service obligation to serve in the SELRES for at least 6 years in addition to any other SELRES obligation.

c. USAR Soldiers on AGR status who indefinitely reenlist while in an AGR status and who subsequently REFRAD with concurrent assignment to another SELRES category and who have not previously established a MGIB-SR eligibility date, must sign a 6-year obligation statement as contained in DA Form 4187 (Personnel Action). The signed DA Form 4187 will be filed in the Soldier's OMPF along with the DD Form 2384-1 and the DA Form 5435. The MGIB-SR eligibility start date will be the date the DA Form 4187 is signed and approved.

3-9. Notice of basic eligibility

When a Soldier meets all of the eligibility criteria outlined in paragraphs 3-4a(a) through 3-4a(j), they will be issued DD Form 2384-1. Following issuance of a DD Form 2384-1, the Soldier may apply to the DVA for educational assistance. The DD Form 2384-1 is a safeguarded form and will not be distributed below battalion level. It is available through normal forms supply channels.

a. USAR TPU Soldiers will be furnished a DD Form 2384-1 by their unit officials. ARNGUS Soldiers will be furnished a DD Form 2384-1 via the Information Management and Reporting Center System. Copies of the DD Form 2384-1 will be distributed as follows:

(1) The original will be given to the Soldier to support their application for benefits to the DVA.

(2) A copy will be provided to the Information Management and Reporting Center.

(3) A copy will be inserted in the Soldier's OMPF.

b. MGIB-SR program administration and data reporting for USAR Soldiers not assigned to a TPU is the responsibility of HRC. Enrollment, to include issuance of the DD Form 2384-1, will be accomplished between the USAR and/or ARNG Soldier and their personnel management officer (PMO) and State incentive manager (SIM), or career adviser at HRC and/or State headquarters. Copies of the DD Form 2384-1 will be distributed as follows:

(1) The original will be given to the Soldier to support their application to the DVA.

(2) A copy will be inserted in the Soldier's Army Military Human Resource Record (AMHRR).

3-10. Educational assistance

a. The DVA will provide educational assistance under the MGIB-SR to an eligible Soldier pursuing a program of education approved by the DVA. A program of education includes undergraduate, vocational, technical, flight training, graduate, and post graduate courses.

b. Eligible Soldiers are entitled to educational assistance to pursue a program of education at a rate determined by the DVA and announced by a HQDA memorandum on an annual basis.

c. The maximum benefit period is 36 months based on full-time status, or 48 months based on 3/4-time status, or 72 months based on 1/2-time status, or the number of months determined by the DVA based on less than 1/2-time status.

3-11. Duplication of benefits

Soldiers entitled to receive benefits under any of the programs listed below are not eligible to receive benefits under the MGIB-SR, as prescribed by this chapter, at the same time. The Soldier must select the educational assistance program desired according to counseling provided by the DVA.

- a. Basic Educational Assistance Entitlement for Service on AD (38 USC Chapter 30).
- b. Educational Assistance for Personnel Enlisting for AD (10 USC Chapter 107).
- c. Basic Educational Assistance Entitlement for Service in the Selected Reserve (38 USC Chapter 30).
- d. Post 9/11 GI Bill (38 USC Chapter 21).

3-12. Individual application procedures

To apply for educational assistance under the MGIB-SR, an eligible Soldier should—

a. Obtain a VA Form 22-1990.

(1) Call or write the nearest DVA regional office to obtain the form.

(2) Consult the local telephone directory under 'U.S. Government, Veterans', for the toll-free number to call a DVA representative, or visit the DVA at <http://www.benefits.va.gov/gibill/>. The online application process is available at the Veterans On-Line Application (VONAPP) Web site at <http://vabenefits.vba.va.gov/vonapp/main.asp>.

(3) Obtain a DD Form 2384-1.

b. Select a school or program.

(1) Obtain information about approved programs from the DVA regional office servicing the area where the school(s) is located. There are four different regions. Soldiers should send information to the respective States' DVA office.

(2) Select a program that is approved for the enrollment of Veterans and eligible persons.

(3) Select a college, university, or other institution of higher learning.

c. Complete and submit VA Form 22-1990 (available at <http://www.benefits.va.gov/gibill/>).

(1) Complete VA Form 22-1990.

(2) Send the form and your DD Form 2384-1 directly to the DVA regional office as early as possible before planning to enroll.

(3) If already enrolled, give the completed form and DD Form 2384-1 to the school's certifying official for submission to the DVA with a VA Form 22-1999.

3-13. Transfer of benefits

a. Public Law 110-252, enacted 10 USC 16132a, providing authority to transfer unused MGIB-SR education benefits to the member's spouse and children.

b. Department of Defense Instruction (DODI) 1322.17 further elaborates transferability authority.

3-14. Termination of entitlement

Entitlement to educational assistance under the MGIB-SR ceases if an enrolled Soldier is:

a. Declared an unsatisfactory participant per AR 135-91 (see absences). For Soldiers assigned to a TPU, the termination date entered into personnel data reporting systems must be the date the Soldier attained their 9th unexcused absence (see AR 135-91), or the date the Soldier is determined to be an unsatisfactory participant for failing to attend or complete the entire period of AT (see AR 135-91, conditions of unexcused absences).

b. Discharged or separated from the SELRES except—

(1) To accept appointment as a commissioned officer or WO as a Reserve of the Army with assignment to the SELRES. Entitlement under the MGIB-SR will continue under the original DD Form 2384-1.

(2) An officer who vacates their commission to enlist or reenlist with concurrent assignment to the SELRES. Entitlement under the MGIB-SR will continue under the original DD Form 2384-1.

(3) When separated because of a disability that occurred after the eligibility date and which is not the result of the Soldier's own willful misconduct. In such a case, entitlement to benefits will continue for a 14-year period after separation from the SELRES.

(4) When ordered to AD without their consent during a period of war or national emergency.

(5) During the period beginning on 1 October 1991 and ending on 31 December 2001 or beginning on 1 October 2007 and ending on 30 September 2014, a Soldier who received a DD Form 2384-1 and was involuntarily separated from the SELRES retains entitlement to benefits under the MGIB-SR for a 14-year period after separation from the SELRES. For the purpose of this paragraph, involuntarily separated refers to the separation of a Soldier from a paid

position in the SELRES, to include an IMA position, by reason of disability (not due to the Soldier's own or willful negligence) incurred on or after the date of entitlement to educational assistance, unit inactivation, or re-designation of the SELRES under the provisions of 10 USC 10143(b). A Soldier will not be considered to be involuntarily separated if discharged, transferred, or reassigned from the SELRES as a result of one or more of the following reasons:

- (a) At their own request unless for early retirement (15-year letter).
- (b) As a result of unsatisfactory participation, or unsatisfactory performance, or under other adverse conditions including a transfer with a tentative characterization of under other than honorable conditions.
- (c) Failure to meet qualifications for membership in the SELRES under law or regulations, to include medical fitness standards.
- (d) Immediately eligible for retired pay under any provision of law based on military service.
- (e) Immediately eligible for an unreduced annuity under the Civil Service Retirement System or the Federal Employees Retirement System if serving as a military technician.
- (f) Eligible for separation pay.
- (g) Refusal to accept another position in the SELRES (USAR or ARNGUS) that was offered to them within reasonable commuting distance (for example, the longest distance a Soldier can be expected to travel involuntarily between their residence and a site where inactive duty training is conducted or, if outside reasonable commuting distance, was located at or in close proximity to the location of the unit with which the Soldier had been affiliated). Such position must not require a reduction in the Soldier's grade, but may be in a different MOS, even if formal training in the new MOS is required.
- (h) For the purpose of entry on EAD, or for the purpose of immediate appointment or enlistment in a Regular Component, or another RC for continued service in the SELRES.
- (i) Soldier was not assigned, at the time of transfer or discharge, to an authorized position in the SELRES which qualified them for basic pay or compensation for inactive duty training.
- (j) Soldier was discharged on the expiration of their term of enlistment, unless they were fully qualified for reenlistment, requested reenlistment, but was not authorized to reenlist.
 - c. Is serving on AD or full-time National Guard duty in an AGR status (see para 3-4(i)).
 - d. Receives financial assistance under an ROTCS per 10 USC 2107.
 - e. If a Soldier is already enrolled in an educational institution when the entitlement period expires and:
 - (1) The Soldier is enrolled in an institution operated regularly on a quarter or semester basis and the entitlement period will expire during a quarter or semester, if approved by the DVA, the benefit period will be extended to the end of that quarter or semester; or
 - (2) The Soldier is enrolled in an institution not operated regularly on a quarter or semester basis and the entitlement period will expire after a major portion of the course is completed, if approved by the DVA, the benefit period will be extended to the end of the course or for 12 weeks, whichever is earlier.
 - f. Is activated under 10 USC 12301(a), 10 USC 12301(d), or 10 USC 12301(g), 10 USC 12302, or 10 USC 12304. In this case, the VA will extend the entitlement period by the length of the AD service plus 4 additional months. The Soldier will receive a separate extension for each AD call-up. This extension will be given regardless of whether or not the Soldier stayed in the SELRES. The law does not permit the VA to extend eligibility for call-ups under 32 USC.

3-15. Expiration of entitlement (14-year delimiting period)

Soldiers who contracted for MGIB-SR entitlement between 1 October 1992 and 30 June 2008 have a 14-year period (delimiting period) from the date of issuance of the DD Form 2384-1 (Notice of Basic Eligibility) in which to use benefits under the MGIB-SR or the benefits will expire (delimiting period). Soldiers may receive benefits until the 14-year period of eligibility ends or they use all their entitlement, whichever comes first, except that:

- a. If a Soldier is prevented from pursuing an educational program under the MGIB-SR because of a physical or mental disability incurred in or aggravated by service in the SELRES (not the result of the Soldier's own willful misconduct), and the Soldier applies to the DVA for an extension of the 14-year period, within 1 year after the last day of the 14-year period, or the last day of the disability, whichever is later, in order to preserve eligibility, the delimiting period will not run for the period of the disability.
- b. Soldier is activated under 10 USC 12302, 10 USC 12301(a), 10 USC 12301(d), or 10 USC 12302(g), or 10 USC 12304. In this case, the VA will extend the eligibility period by the length of the AD service plus 4 additional months. The Soldier will receive a separate extension for each AD call-up. This extension will be given regardless of whether or not the Soldier stayed in the SELRES. The law does not permit the VA to extend eligibility for call-ups under 32 USC.
- c. A Soldier's delimiting expired during a period of enrollment in training. The VA may extend eligibility to the end of a term, quarter, or semester. If the school doesn't operate on a term basis, the VA may extend eligibility for up to 12 weeks.

3-16. Re-affiliation in the Selected Reserve

- a. Upon re-affiliation, a Soldier's entitlement to benefits will be adjusted by the amount previously awarded

according to DVA regulations. The period of the SELRES service required of a Soldier who re-affiliates will be at least the difference between the previous period of satisfactory SELRES service performed and 6 years. The gaining unit will report the original eligibility date listed on DD Form 2384-1, from the Soldier's AMHRR.

b. Only one voluntary release from the SELRES not to exceed a 3-year time period for missionary obligation or 1-year time period for all other circumstances may be permitted during the 10-year or 14-year benefit period for the purpose of regaining eligibility to authorized educational assistance benefits.

c. Following a period of satisfactory service, a Soldier who is released from the SELRES for a reason shown below may regain eligibility for educational assistance provided re-affiliation in the SELRES occurs within 1 year, except in cases involving a religious missionary obligation where the Soldier has up to 3 years in which to re-affiliate.

d. A voluntary separation or reassignment authorized by appropriate regulations (see para 3-16*b*).

e. When a Soldier is ordered to AD without his or her consent during a period of war or national emergency and loses SELRES status as a result, re-affiliation within 90 days of release from such period of AD will allow the Soldier to regain eligibility for educational assistance under this chapter. SELRES Soldiers who are ordered to AD pursuant to Presidential Reserve call-up (see 10 USC 12304), or under other circumstances not requiring their inclusion in the Active Army end strength, do not lose their status as members of the SELRES during the period of such AD, unless otherwise transferred from the SELRES.

f. A Soldier whose eligibility for educational assistance is suspended upon entry on AGR status may regain such eligibility on release from AGR status and re-affiliation with a SELRES unit or the IMA Program (see para 3-6).

3-17. Recoupment

Soldiers who receive educational assistance payments and lose entitlement due to unsatisfactory participation or failure to re-affiliate in accordance with the provisions listed in paragraph 3-15 and in AR 601-210 may be required to refund part of the educational assistance received plus accrued interest. The certifying official for all recoupment actions is the CAR or CNGB, but may be further delegated by appropriate memorandum authority. The recoupment is based on a formula prescribed by the DOD and the DVA. Note: Soldiers should consider re-affiliation in the SELRES to avoid being processed for recoupment.

3-18. Selected Reserve Incentive Program and the Montgomery GI Bill-Selected Reserve

a. A Soldier entitled to benefits under the MGIB-SR may also be eligible to participate in the following incentives:

- (1) Enlistment bonuses.
- (2) Reenlistment and/or extension bonus.
- (3) Affiliation bonus.
- (4) SLRP (see chap 5).

b. Soldiers must meet the eligibility requirements of the incentive and the MGIB-SR to qualify for both.

c. Particular attention must be paid to Soldiers who may qualify for the reenlistment and/or extension bonus. The Soldier may execute a reenlistment or extension agreement up to 12 months prior to their current separation date, and payable on the first day of the new contract (the day after current expiration term of service (ETS)). A Soldier is entitled to receive the incentive offered at the time of contracting, not the incentive offered at the time the bonus becomes payable. The Soldier should be advised that incentives offered are subject to change, to ensure the Soldier understands the incentive to be contracted for and received. The Soldier's eligibility for incentives and MGIB should not be adversely affected if they choose to reenlist or extend within the 12 months prior to his or her current ETS date.

3-19. Montgomery GI Bill -Selected Reserve 10 USC Chapter 1606 and the mobilized Soldier

a. Soldiers called to AD in support of a contingency operation need not have their MGIB-SR 10 USC Chapter 1606 benefits automatically suspended while they are serving on AD. Many Soldiers are still able to enroll in, participate, and complete accredited courses while on AD. Therefore, their MGIB-SR benefit should not automatically be suspended upon their call to AD.

b. In accordance with established DVA policy and procedures, the DVA automatically extends the delimiting period for use of MGIB-SR 10 USC Chapter 1606 benefits to those Soldiers ordered to AD in support of any contingency operation. The extension of benefits equals the period of the mobilization period plus 4 months. Soldiers must submit a copy of their DD Form 214 to the DVA in order to receive the extension.

Section II

Montgomery GI Bill Kicker Selected Reserve Kicker

3-20. General

This chapter provides policy and guidance for the administration of the Educational Assistance Allowance Increase, short title "MGIB-SR Kicker," for members of the SELRES. Army RC participation, amount, MOS and/or skill eligibility will be announced annually in the DCS, G-1 annual policy guidance for the SELRES Incentive Program.

3-21. Purpose

The purpose of the MGIB-SR Kicker is to recruit and retain enlisted Soldiers, WOs, and officers in critical specialties, skills, and/or critical units.

3-22. Scope

A Service member can only be granted the MGIB-SR Kicker once. He or she must remain in the same Army RC that granted the MGIB-SR Kicker in order to receive the entitlement during their 6-year contract under the Kicker program, unless authorized by the designated SECARMY representative.

3-23. Eligibility

To qualify for the MGIB-SR Kicker, SELRES members must meet all of the following requirements:

- a. Enlisted Soldiers must—
 - (1) Enlist, reenlist, or extend in the SELRES for a period of not less than 6 years.
 - (2) Be eligible to receive basic benefits under 10 USC Chapter 1606, AR 601-210, and in accordance with paragraph 3-4, eligibility criteria for MGIB-SR. If Soldier is also qualified under 38 USC Chapter 30, the MGIB-SR Kicker may also be applied to increase the monthly stipend.
 - (3) Be a secondary school diploma graduate or equivalent credit.
 - (4) Score 31 or above on the AFQT. (The respective component may require an AFQT higher than 31.)
 - (5) NPS applicants must have completed initial active duty training (IADT), including the Alternate Split Training Program option, when applicable.
 - (6) PS applicants must possess a MOS and/or skill or valid substitute to meet the SELRES unit position vacancy critical specialty requirement.
 - (7) Contract in a critical specialty, skill position, and/or a designated critical unit.
 - (8) Continue satisfactory performance in the SELRES for which they contracted.
 - (9) For USAR, complete DA Form 5435-1 (Statement of Understanding-The Selected Reserve Montgomery GI Bill Kicker Program) (see 10 USC 16131).
 - (10) For ARNG, complete NGB Form 5435 (Annex K to DD Form 4, Montgomery GI Bill Kicker Incentive Addendum, The Army National Guard of The United States) to reflect the \$200 amount.
 - (11) Must not be receiving an Army ROTCS under 10 USC 2107.
- b. Officers must—
 - (1) Be a lieutenant without a baccalaureate degree.
 - (2) Complete the OBC.
 - (3) Be appointed, or currently serving, as a Reserve officer or WO and agree to serve in the SELRES for a period of no less than 6 years. The officer's 6-year obligation must be in addition to any other period of obligated service in the SELRES.
 - (4) Be eligible to receive basic benefits under 10 USC Chapter 1606 or 38 USC Chapter 30.
 - (a) For USAR, complete DA Form 5435.
 - (b) For ARNG, complete NGB Form 5435, reflecting the \$350 Kicker amount.
 - c. An officer or WO candidate must—
 - (1) Meet the criteria of paragraphs 3-22b(1) through 3-22b(4).
 - (2) As an enlisted member receiving the Kicker, may continue receipt of the Kicker at the higher rate while a candidate and after accepting the oath of office.
 - (3) When contracting as a candidate for the Kicker, may continue receipt of the Kicker after accepting the oath of office.
 - (4) For ARNG, complete NGB Form 5435-1 (Annex K to DD Form 4 (Supplemental), Montgomery GI Bill Kicker Incentive Addendum, The Army National Guard of the United States) to reflect the increase from the \$200 Kicker to \$350.
 - d. SROTC and/or SMP cadets must—
 - (1) First complete IADT to qualify for benefits under 10 USC Chapter 1606. The award of reporting codes 09R10 or 09R20 do not serve as verification that the Soldier and/or cadet has completed the combination of basic combat training and advanced individual training. Note: ROTC basic and advanced camps do not qualify as IADT. Note: Cadets who enlist as a NPS applicant at a MEPS as a SMP cadet are not eligible for MGIB-SR.
 - (2) Be updated in the DMDC database in order for the DVA to pay benefits when determination is made that the cadet is a SMP cadet.
 - (a) For USAR, complete DA Form 5435.
 - (b) For ARNG, complete NGB Form 5435.
 - (3) In order for a cadet to be eligible for the ROTC and/or SMP Kicker, the Soldier must first be eligible for the MGIB-SR basic benefit.

(4) A cadet who voluntarily leaves or does not successfully complete the ROTC and/or SMP and has a previously contracted Kicker at the lower \$100 and/or \$200 rate may continue to receive their Kicker at the lower rate as long as they return to an MOS-qualified status in a Kicker eligible position or unit.

3-24. Entitlement

a. MGIB-SR Kicker incentive payments will not exceed a maximum of 36 academic months based on full-time educational assistance. A Service member can only receive the Kicker for the number of months of basic eligibility remaining. Example: If a PS member enlists in an Army RC for the Kicker at the \$200 level and has 30 months of basic MGIB remaining, he or she may receive 30 payments at \$200 each for attending school full-time.

b. The dollar amount of the MGIB-SR Kicker incentive will remain the same for the duration of the Kicker contract. The dollar amount may only be increased when authorized and when an enlisted Soldier is entering an officer or WO candidacy program. When the Soldier fails to complete the officer or WO program, the Kicker incentive will be reduced to the original amount received prior to entering an officer or WO candidacy program.

c. The amount of the MGIB-SR Kicker incentive will be announced in annual FY HQDA policy guidance.

d. A Servicemember retains the MGIB-SR Kicker if involuntarily reassigned to another position at the COG. State adjutants general (ARNGUS) and area commanders (USAR) may authorize transfers to another position at the COG. The term 'involuntarily separated' refers to separation from a paid position in the SELRES and includes separation because a unit is in transition, reclassification of a position to noncritical, acceptance of an appointment as an officer in the SR, transfer to another position at the COG, or promotion within the specialty or skill career progression path that provided MGIB-SR Kicker eligibility.

e. If, during the 6-year obligation, an authorized period of absence is granted—

(1) The Servicemember must return to the critical skill position and/or critical unit that established eligibility for the MGIB-SR Kicker to resume receipt of the incentive.

(2) The Servicemember must return by the end of the authorized period of nonavailability.

(3) The Servicemember must extend their term of service for the period of nonavailability to complete the total 6-year obligation.

(4) The Servicemember must be formally counseled concerning the disposition of their incentive.

3-25. Continued Receipt of Montgomery GI Bill-Selected Reserve Kicker incentive

a. A Soldier must remain duty military occupational specialty qualified (DMOSQ) unless his or her status was changed involuntarily through unit transition, reclassification of a position to noncritical, transfer to another position at the COG, or the acceptance of an appointment or promotion within the specialty or skill career progression path that provided the MGIB-SR Kicker eligibility. Exceptions are provided to those individuals entering an officer or WO producing program.

(1) When non-DMOSQ occurs due to involuntary status change, the Servicemember must become DMOSQ within 24 months to continue receipt of the MGIB-SR Kicker payments.

(2) When otherwise eligible, the Servicemembers are entitled to receive MGIB-SR Kicker payments while they become MOS qualified in the new position.

(3) When DMOSQ does not occur within the time limit required, MGIB-SR Kicker payments will terminate without recoupment.

b. The MGIB-SR Kicker may be continued or extended under the same circumstances and for the same periods as the basic MGIB-SR entitlements.

c. On completion of the MGIB-SR Kicker obligation (6 years), a Servicemember is not obligated to remain in the same MOS and/or skill or same RC to continue receipt of the MGIB-SR Kicker. However, the Servicemember must remain in an active status with a SELRES unit in order to continue receipt of the payments.

d. When a Servicemember's unit, in transition, is unable to reassign the member in an Army RC unit, the member may be assigned to the Individual Ready Reserve (IRR) in the USAR, or the Inactive National Guard (ING), but will not continue to receive the MGIB-SR Kicker.

e. Every effort should be made to retain the Servicemember in the Army; however, due to unit transition, the Soldier may request affiliation with another RC, other than the Army, when the traveling distance is beyond established policy. The Servicemember's incentive should be suspended to prevent delays in receipt of payments caused by the re-affiliation process to another Reserve.

f. Once an individual is reverted to a lesser amount they may not be increased again. A Servicemember who was not receiving a kicker prior to entering an officer candidacy program will be terminated from the Kicker Program; however, if their MOS becomes eligible at a later date and they have basic MGIB-SR or MGIB basic entitlements remaining, they may be eligible for the kicker upon reenlisting and/or extending.

3-26. Suspension

a. During a period of nonavailability, a Soldier will be suspended, on a one-time basis, for a specified period rather

than terminated from the MGIB–Kicker incentive program. Full policy regarding suspension of incentives is in AR 601–210 and is limited to the following conditions:

- (1) Missionary obligations for a period not to exceed 3 years.
 - (2) Transfers to the ING or the IRR or other authorized absences for personal reasons for a period not to exceed 1 year.
- b.* Reinstatement of incentive eligibility, when authorized, requires the Servicemember to serve in the critical specialty, skill, and/or unit for a period that, in combination with time already served, will equal 6 years. The Servicemember must return to the same critical skill unless otherwise authorized by the CAR for USAR members or Director, Army National Guard for ARNGUS members.
- c.* Once a Servicemember enters a period of service where favorable personnel actions are suspended (for example due to an adverse action flag), the Servicemember’s MGIB–SR Kicker incentive will be suspended. This excludes suspension of favorable personnel actions for Army Physical Fitness Test failure or failure to meet body fat standards.
- d.* MGIB–SR Kicker incentives suspended after the 6-year obligation is served will be restored upon re-affiliation in the SELRES in any position or unit of any component as long as the Servicemember is eligible for the MGIB–SR Kicker, and has MGIB–SR basic benefits remaining.

3–27. Termination

Termination of MGIB–SR Kicker incentive will occur should a Servicemember be terminated prior to the fulfillment of their 6-year contractual agreement and obligation. Full procedures are outlined in AR 601–210.

- a.* Unsatisfactory participation (the date the Soldier attained their 9th unexcused absence, per AR 135–91).
- b.* If transferring to the USAR Control Group (ROTC) for the purpose of accepting an AD scholarship as provided in 10 USC 2107.
- c.* Failure to complete a commissioning program (for example Officer Candidate School (OCS) or SMP cadet), or failure to accept the oath of office.
- d.* Enters the AGR or Military Technician Program where membership is required for full-time employment.

3–28. Recoupment

- a.* Recoupment of MGIB–SR Kicker may occur as outlined in AR 601–210.
- b.* When the MGIB–SR basic and MGIB–SR Kicker 6-year obligation start dates differ, the recoupment formula is applied separately to each benefit and incentive to determine the total amount of recoupment plus accrued interest.
- c.* Officer and WO candidates who complete the candidacy program but refuse to accept an appointment or do not complete the respective basic course within 24 months after completing the program will be terminated from the Kicker program and the full amount will be recouped. This is in reference to a Servicemember who received the Kicker based on a candidacy program and the acceptance of an appointment.
- d.* Servicemembers who were receiving a lower level kicker prior to contracting as a candidate who complete the candidacy program but refuse to accept an appointment, or do not complete the Basic Officer Leader’s Course within 24 months after completing the program will be terminated from the Kicker program and recouped the difference of the lower level Kicker and the increased Kicker level.
- e.* CNGB or office of the CAR is granted waiver authority for MGIB–SR recoupment. A waiver will be based on the determination that failure to maintain eligibility was due to reasons beyond the control of the Soldier and in accordance with AR 601–210.
- f.* When recoupment is warranted, the following guidance will apply:
 - (1) The amount of recoupment will be determined by the DFAS.
 - (2) The amount will be calculated by taking the basic benefit and/or incentive, multiplied by the number of obligated months not completed, and divided by 72.
 - (3) Calculated overpayment will be recouped.
 - (4) Calculated underpayment will be paid to the Servicemember.
 - (5) Any recoupment or refund paid to the Servicemember will not affect their period of service obligation to serve in the ARNGUS or USAR.
- g.* All debts to the Government will be submitted for collection from SELRES members when a waiver is not authorized. Delinquent repayment will result in the collection of interest on the remaining balance.

3–29. Reporting requirements

- a. Funding.*
 - (1) The RC concerned will calculate the monthly amounts for the MGIB–SR Kicker separately using per capita amounts for each benefit level provided by the DOD Comptroller as established by the DOD Education Benefits Board of Actuaries.
 - (2) The amount to be transferred to the Education Benefit Fund will be determined by multiplying each amount level (\$100, \$200, or \$350) by the number of Servicemembers who first become eligible during the previous month at

such level. The MGIB–SR Kicker amounts will be added to the monthly amount transferred to the Education Benefit Fund for the basic benefit. (The beginning date of eligibility is recorded using the data element ‘Kicker Eligibility Start Date’.)

b. Information requirements for reporting MGIB–SR Kicker eligibility.

(1) The RC will report MGIB–SR Kicker activity by monthly transmission to DMDC.

(2) DMDC will consolidate data from the RC and pass eligibility information to DVA by the best means available.

3–30. Inquiries and comments

a. For USAR Soldiers, send inquiries to Chief, Army Reserve G–1, (AFRC–PRT–R), (AFRC–PRT–R), 4700 Knox Street, Fort Bragg, NC 28310–5010. Forward additional inquiries (for example, IMA, IRR, and AGR) through channels to Commander, HRC.

b. For ARNG Soldiers, send inquiries to their respective SIM. Forward additional inquiries through channels to Chief, National Guard Bureau (ARNG–GSE–E), 111 South George Mason Drive, Arlington, VA 22204–1382.

Section III

Reserve Education Assistance Program - (10 USC Chapter 1607) for Mobilized Soldiers Education Eligibility Requirements

3–31. General

The REAP is authorized in 10 USC Chapter 1607 and provides educational assistance to RC members called or ordered to active service in response to a war or national emergency declared by the President or Congress.

3–32. Scope

Congress enacted the REAP in the NDAA of 2005 (PL 108–375), in recognition of the sacrifices that those members make in answering the call to Active Duty in support of a national contingency operation since 11 September 2001.

3–33. Eligibility

On or after 11 September 2001, a Service member of the SELRES or Ready Reserve may be eligible for 10 USC 1607 benefits. The first date from which the 90-day eligibility requirement may be calculated is 11 September 2001. This date applies to members who began performing service prior to 11 September 2001.

a. Service members may qualify—

(1) By serving at least 90 consecutive days but less than 1 continuous year of AD in a qualifying status. Soldier is entitled, without any monetary contribution, to education assistance benefits under 10 USC Chapter 1607 equal to 40 percent of the MGIB–AD benefit authorized in 38 USC 3015.

(2) By serving at least 1 continuous year but less than 2 continuous years as above, a Soldier is entitled to 60 percent of the referenced benefit.

(3) By serving 2 or more continuous years as mentioned above, a Soldier is entitled to 80 percent of the referenced benefit. Note: NDAA 2008 (PL 110–181), effective 28 January 2008, allows for RC Soldiers to increase their benefit percentage to 80 percent by combining two or more periods of qualifying AD service after 11 September 2001 for a cumulative total of 3 or more years of qualifying AD.

(4) If released from AD before completing 90 consecutive days because of an injury, illness, or disease incurred or aggravated in the line of duty, a Soldier will be entitled to education assistance at the 40 percent rate. A line of duty determination is required.

(5) If, after becoming entitled to educational assistance, a Soldier is separated from the SELRES because of a disability not due to their own willful misconduct, the Soldier’s entitlement expires at the end of the 10-year period beginning on the date of which he or she became entitled to educational assistance. A line of duty determination is required.

b. AGR personnel, as defined in 10 USC 101(d)(6)(A), may qualify for this benefit.

(1) AGR personnel must have their name listed on an individual or collective by-name list of personnel stating that they have been mobilized and/or deployed to support a qualifying contingency or operation.

(2) AGR personnel cannot establish eligibility solely because the unit, including the overall unit, alerted for mobilization.

(3) An AGR member cannot gain eligibility by merely providing support, even if direct support to a mobilized portion of the unit, unless the AGR member is mobilized or deployed with the unit.

(4) An AGR member must possess orders that clearly indicate that he or she was mobilized or deployed with a unit activated to support a contingency.

c. Reclamas concerning eligibility will be submitted by the individual concerned and handled at the Service level under guidance to be provided by the respective Service.

3-34. Required notification by Service departments

Each RC military Service Department is responsible for providing written notification using DD Form 2940 (Statement of Entitlement to Educational Assistance for Reserve Components Supporting Contingency Operations and Certain National Emergency Response Operations) to its Servicemembers regarding their entitlement to receive benefits under Chapter 1607, prior to release from Active Service.

3-35. Entitlements

a. Entitlement for this program is limited to a maximum of 36 months of full-time benefits (or equivalent part-time benefits). A maximum of 48 months of full-time benefits can be obtained when a Servicemember is entitled to more than one GI Bill program; for example, use of Reserve GI Bill (10 USC Chapter 1606), AD GI Bill (38 USC Chapter 30), Dependent Survivors GI Bill (38 USC Chapter 35) or AD GI Bill-VEAP (38 USC Chapter 32) or AD GI Bill-Vietnam Era (38 USC Chapter 34) or Post-9/11 GI Bill (38 USC Chapter 33) in excess of 12 full-time benefit months will directly affect the number of months of benefits a Servicemember may be entitled for 10 USC 1607.

b. If, by virtue of the same period of active service, the member is able to establish eligibility for the program of educational assistance established by 38 USC Chapter 30 and 10 USC Chapter 1607, the Servicemember will make an irrevocable election, in writing, as to the program to which such service is to be credited, on the DD Form 2941 (Statement of Irrevocable Election of Educational Assistance Benefits Based on Qualifying for Educational Assistance). Such election must be processed through the respective Service for validation prior to being submitted to the DVA for payment.

c. If 38 USC Chapter 30 is selected, the Service Department will document this selection via established procedures as established by the Service Department and verify the \$1,200 pay reduction has been made prior to validation of the member's election and submission to DVA. Upon validating the Servicemember's election, the Service Department will record the member's election, provide a copy to the Servicemember, and retain a copy of the document.

3-36. Maintaining eligibility to receive benefits

Generally, a Soldier must remain in the SELRES or the Ready Reserve in order to continue to receive benefits under 10 USC Chapter 1607. A Soldier cannot transfer to ING, IRR, Active Components (AGR or RA), or civilian status. Note: PL 110-181, as contained in NDAA 2008, effective 28 January 2008, allows for RC Soldiers to maintain their REAP entitlements for a period of 10 years following their transfer or discharge from the SELRES if the following apply: 1) Soldiers successfully completed their service contract and 2) Soldiers are discharged under honorable conditions.

3-37. Individual application procedures

All claims for educational assistance must be filed with the DVA. Information on how to file for benefits can be found on the DVA Web site available at <http://www.benefits.va.gov/gibill/>. Complete the DVA application form (VA Form 22-1990) and forward it to the DVA office. Be sure to include a copy of the DD Form 214 and attach the DD Form 2384-1.

3-38. Termination of benefits

A Servicemember's eligibility for educational assistance:

- a.* When the Soldier has used all allowable months of educational benefits.
- b.* If the Soldier is receiving education assistance under 10 USC 2107 as a member of the SROTC Program. However, termination is not applicable to Servicemembers who receive educational assistance under 10 USC 2107a.
- c.* Educational assistance also terminates when the member separates from the IRR, in the case of a Servicemember ordered to AD while serving in the Ready Reserve (other than the SELRES).

3-39. Exception to termination

In accordance with NDAA 2008, as an exception, the SECARMY may provide educational assistance to a member of the SELRES of the Ready Reserve who incurs a break in service in the SELRES of any amount of days if the member remains in the IRR and re-affiliates with the SELRES. The Soldier may re-gain their lost REAP benefit.

3-40. Public laws amending Reserve Education Assistance Program

- a.* Buy up. NDAA 2008 made the following changes to REAP. It provided—
 - (1) An opportunity for certain REAP eligible Soldiers to contribute up to \$600 to enhance basic REAP benefits. To be eligible a Soldier must—
 - (a)* Maintain REAP eligibility.
 - (b)* Make a lump-sum payment up to \$600 (must be in \$20 multiples) for up to 30 months. The maximum \$600 contribution would increase total basic REAP benefits by \$5,400. REAP benefits will increase by \$5 per month for 36 months for each \$20 contributed. Eligible Soldiers may contribute at any time while in the Ready Reserve.
 - (2) USAR or ARNG MGIB points of contact responsibilities to—

(a) Confirm REAP eligibility by verifying Soldier's qualifying service and eligibility for participation in the REAP benefits enhancement opportunity.

(b) Prepare a DD Form 2366-1 clearly noting on top of form that contribution is for 'REAP BUY UP'.

(c) Provide Soldiers with a copy of the DD Form 2366-1. Instruct Soldiers to safeguard the DD Form 2366-1 and proof of payment, since a copy will be required by the DVA when the Soldiers make claims for benefits.

(3) Payment.

(a) Payment is nonrefundable and cannot be waived as it is law. Soldiers may make payment at any time while serving in the Ready Reserve.

(b) Method of payment. Lump-sum payment of \$600. Soldiers in Ready Reserve must contact their owning RC to make a lump-sum payment. Soldiers must ensure a cash collection voucher is received and maintained in a safe place, as they will be required to provide a copy to the DVA when applying for MGIB benefits.

(c) The DVA will pay benefits as of the first day following the beginning of the school term.

(4) Benefits.

(a) The REAP benefit will increase by \$5 for 36 months for each \$20 contributed. For example, if a Soldier contributes the maximum \$600 additional amount, the basic REAP benefit will increase by \$150 per month.

(b) The MGIB-SR Kicker is not affected by the additional contribution.

b. Public Law 110-181, National Defense Authorization Act of 2008. Key provisions of this law include the following:

(1) 80 percent rate for REAP based on aggregate service of 3 or more years; mobilized for at least 2 continuous years; or served multiple mobilizations since September 11, 2001 totaling 3 or more years. Retroactive payments are not authorized. Higher rate is effective 28 January 2008.

(2) \$600 Buy-up program for REAP participants. REAP-eligible Soldiers may pay up to \$600 to increase their monthly benefit by \$150 (\$150 x 36 months = \$5,400); must be a member of the Ready Reserve to pay into the program: SELRES, IRR, or ING.

(3) Retention of REAP eligibility during breaks in SELRES service expands reinstatement eligibility to Servicemembers having a break in service (regardless of length) as long as they serve in another component of the Ready Reserve (such as IRR or ING) during the break in service.

(4) Modified ending dates for REAP participants separated from the SELRES. REAP-eligible Servicemembers who separated from the SELRES after completing their service contract retain eligibility for REAP benefits for 10 years after they separate.

(5) Accelerated payment for MGIB-SR and REAP-Reservists eligible for MGIB-SR or REAP may receive accelerated payments for nondegree programs lasting 2 years or less effective 1 October 2008.

(6) Modified ending dates for MGIB-SR participants involuntarily separated. Servicemembers involuntarily separated from the SELRES due to a unit deactivation are eligible to retain their MGIB-SR eligibility for 14 years from their original date of eligibility. Unit deactivation must occur between 31 October 2007 and 30 September 2014. Provision is effective on 28 January 2008.

c. PL 110-252 removed the 14-year delimiting period and provided that the period during which a person is entitled to educational assistance under MGIB-SR "expires on the date the person is separated from the Selected Reserves."

Chapter 4

Post-9/11 GI Bill

4-1. References

a. DODI 1341.13.

b. 38 USC Chapter 33.

c. 38 CFR Part 21, Subpart P.

4-2. Objective

The purpose of this policy is to implement the Post-9/11 GI Bill in order to enhance the Army's recruiting and retention programs.

4-3. Eligibility

For the purposes of this policy, the term 'Armed Services' does not include the IRR unless otherwise noted. The DVA is responsible for determining eligibility for education benefits under the Post-9/11 GI Bill. Generally, to be eligible for the Post-9/11 GI Bill, Soldiers must serve on AD on or after 11 September 2001, for at least 30 continuous days with a discharge due to a service-connected disability, or an aggregate period ranging from 90 days to 36 months or more.

4-4. Eligibility exclusions

The following periods of AD are not qualifying AD service for purposes of establishing eligibility for the Post-9/11 GI Bill:

- a.* AD service completed on or before 10 September 2001.
- b.* The 5-year AD service obligation (ADSO) for commissioning from a Service Academy. For purposes of attaining Post-9/11 GI Bill eligibility, this 5-year ADSO is the first 5 years of AD service regardless of any other ADSO that the officer may have incurred due to other incentives.
- c.* The 4-year ADSO for an ROTCS. For purposes of attaining Post-9/11 GI Bill eligibility, this 4-year ADSO is the first 4 years of AD service regardless of any other ADSO that the officer may have incurred due to other incentives. The 3-year ADSO for non-scholarship ROTC commissions, OCS, and direct commission officers is qualifying AD service for determining Post-9/11 GI Bill eligibility.
- d.* The ADSO associated with acceptance of the SLRP incentive. For purposes of Post-9/11 GI Bill qualifying AD service, the ADSO associated with SLRP is the first 3 years of AD service regardless of the length of the initial service obligation. (For example, a Soldier enlists for 5 years and receives SLRP. The first 3 years are not qualifying for Post-9/11 GI Bill eligibility. The last 2 years of the enlistment are qualifying for Post-9/11 GI Bill eligibility.)
- e.* Full-time National Guard Duty performed under Title 32 orders.
- f.* Service as a cadet or midshipmen in one of the Service Academies.
- g.* AD for initial entry training pursuant to enlistment in the ARNG, Air National Guard, USAR, Naval Reserve, Air Force Reserve, Marine Corps Reserve, or Coast Guard Reserve.
- h.* Service that was terminated because a Soldier was a minor, was erroneously enlisted, or received a defective enlistment agreement.
- i.* A period of SELRES service used to establish eligibility under 10 USC Chapter 1606 (MGIB-SR) or under 10 USC 1607(REAP).
- j.* A period of SELRES service used to establish eligibility for entitlements under 38 USC Chapter 30.
- k.* AT conducted under authority of 10 USC 10147 or 10 USC 12301(b).
- l.* For purposes of Post-9/11 GI Bill, service in the IRR in a non-AD status is not qualifying service for either determination of eligibility or eligibility to transfer unused Post-9/11 GI Bill benefits.

4-5. Duration of eligibility

As a general rule, eligible Soldier entitlements expire at the end of a 15-year period beginning on the Soldier's last date of discharge or REFRAD of at least 90 consecutive days (30 days if released or discharged for service-connected disability). The DCS, G-1 determines the last date of discharge or release, if such date cannot be determined clearly.

4-6. Basic benefits

a. Benefits under the Post-9/11 GI Bill are based on a percentage, which is determined by a Soldier's aggregate qualifying length of AD service, found in 38 CFR 21.9640. These include:

- (1) Amount of tuition and fees charged, not to exceed the most expensive in-State undergraduate tuition at a public institution of higher learning (tuition and fees paid directly to the school).
- (2) Monthly stipend equal to the basic allowance for housing amount payable to a military E-5 with dependents, in the same ZIP code as the school that the student is attending (paid to the Veteran). This stipend is not payable to Soldiers who use Post-9/11 GI Bill benefits while on AD.
- (3) Yearly books and supplies stipend of up to \$1000 per year (paid to the Veteran). This stipend is payable to Soldiers who use Post-9/11 GI Bill benefits while on AD.
- (4) A one-time payment of \$500 may be payable to certain Veterans relocating from highly rural areas to attend school (paid to the Veteran). Payment of this benefit is expected to be highly unusual. The DVA will make this determination.

b. Post-9/11 GI Bill Kickers, for those who are eligible, will be paid to the Veteran in conjunction with, and only when receiving, the monthly stipend.

c. The monthly stipend allowance (i.e. 38 USC 3313(c)(1)(B)(iii)), authorizes 50% of the housing stipend if the distance learning is on over a half-time basis (added by PL 111-377 and effective 1 Oct 2011). Soldiers enrolled at half time or less are eligible for an appropriately reduced stipend for books and supplies. The DVA may authorize payment of the monthly stipend allowance if the Soldier is attending at least one class in residence. The DVA is the sole determining authority for when the monthly stipend allowance is paid if courses are taken via distance learning and any prorated amounts paid when attending at less than full-time.

d. Post-9/11 GI Bill benefits are subject to change based on approval by Congress. Benefit payment amounts will vary depending upon one's rate of attendance (for example, full-time, half-time). Payment amounts are determined by the VA.

e. Post-9/11 GI Bill benefits may be used for an approved program of education offered by an institution of higher learning (as that term is defined in 38 USC 3452(f) and is approved for purposes of 38 USC Chapter 30, (including

approval by the State approving agency concerned). This includes graduate and undergraduate training, and some vocational/technical training programs. DVA is the final authority on program eligibility.

f. Benefits may be used for tutorial assistance (up to \$100 per month, not to exceed a total of \$1,200) and reimbursement of licensing and certification tests (not to exceed a total of \$2,000 per test). See 38 USC 3315.

g. Additionally, Soldiers who were eligible for MGIB, MGIB–SR, or REAP, and elect to use benefits under the Post-9/11 GI Bill will be eligible to receive benefits for programs approved under those provisions, such as on-the-job training, apprenticeship training, correspondence courses, flight training, preparatory courses, and national exams, regardless of whether they are authorized under the Post 9/11 GI Bill.

4–7. Benefits for Soldiers pursuing education on active duty

Educational assistance is payable under the Post-9/11 GI Bill Program for pursuit of an approved program of education while on AD.

a. The amount of educational assistance payable will be the amount of tuition authorized for AD. The DVA will make determinations on the amount paid for tuition and fees. Soldiers should verify the amount the DVA will pay for an approved course of education pursued while on AD. The potential exists that the DVA will pay the full cost of tuition and fees, less any TA received, for the education program being pursued. If a Soldier transfers benefits to a spouse and the spouse uses the transferred benefits while the Soldier is still on AD, the rules under this section will apply to the spouse as well. This section does not apply to children who use transferred benefits.

b. Concurrent use of Post-9/11 GI Bill and TA (commonly called Top Up). A Soldier entitled to basic educational assistance under the Post-9/11 GI Bill who is pursuing education or training, may use, at their discretion, Post-9/11 GI Bill benefits to meet all or a portion of the charges of the educational institution for the education or training that are not paid by TA. The DVA administers this portion of the Post-9/11 GI Bill Program.

4–8. Issues for Soldiers with entitlement to existing education programs

a. A Soldier who is eligible for both the Post-9/11 GI Bill and any other DVA educational assistance program may elect to receive educational assistance under the Post-9/11 GI Bill if the Soldier, as of August 1, 2009:

(1) Is entitled to basic educational assistance under MGIB, and has used, but retains unused, entitlement under that program.

(2) Is entitled to educational assistance under EATP, MGIB–SR, or REAP, and has used, but retains unused, entitlement under the applicable program.

(3) Is entitled to basic educational assistance under MGIB, but has not used any entitlement under that program.

(4) Is entitled to educational assistance under EATP, MGIB–SR, or REAP, but has not used any entitlement under that program.

(5) Is a member of the Armed Forces who is eligible for receipt of basic educational assistance under MGIB, and is making contributions towards MGIB.

(6) Is a member of the Armed Forces who is not entitled to basic educational assistance under MGIB, by reason of an election not to enroll in MGIB, and as of the date of the Soldier’s election to use Post-9/11 GI Bill benefits, meets the requirements for entitlement to educational assistance under the Post-9/11 GI Bill.

(7) Is entitled to basic educational assistance under VEAP. VEAP-era Soldiers who did not open VEAP accounts may be eligible for benefits based on qualifying AD service under the Post-9/11 GI Bill.

b. Election to use Post-9/11 GI Bill benefits must be submitted to DVA on the VA Form 22–1990. Determination of eligibility and award of benefits reside with the DVA.

c. An election to convert from MGIB (38 USC Chapter 30), MGIB–SR, or REAP to the Post-9/11 GI Bill is irrevocable and will be governed by the DVA. This includes Soldiers who converted from VEAP to MGIB, as their decision to convert to MGIB is irrevocable.

d. A Soldier entitled to educational assistance under the Post-9/11 GI Bill who is also eligible for educational assistance under the MGIB (38 USC Chapters 31, 32, or 35), EATP, MGIB–SR, REAP, or the provisions of the Hostage Relief Act of 1980 (5 USC 5561) may not receive assistance under two or more such programs concurrently, but will elect (in such form and manner as the Secretary of Veterans Affairs may prescribe) under which chapter or provisions to receive educational assistance.

4–9. Cessation of pay reduction under Montgomery GI Bill

Effective as of the first day of the month beginning on or after the date of an election to convert to the Post-9/11 GI Bill, a Soldier having their pay reduced for MGIB enrollment, will have that pay reduction ceased, and the requirements of such section will be deemed no longer applicable to the Soldier.

4–10. Refund of pay reduction under Montgomery GI Bill

A Soldier who is described in paragraph 4–10, whose pay was reduced due to enrollment in MGIB, will receive a refund of that pay reduction subject to the following:

a. A full refund for a Soldier who used zero months of benefits under the MGIB.

b. A refund reduced by a proportion calculated by the number of months of MGIB benefits used divided by 36.

c. The refund will be added to the monthly stipend allowance paid in the last month of eligibility under the Post-9/11 GI Bill. Refer to paragraph 4–8d for clarification of eligibility to receive the monthly stipend. Soldiers who do not exhaust entitlement under the Post-9/11 GI Bill will not receive a refund of the pay reduction. Example: A Soldier who used 25 months of MGIB (38 USC Chapter 30) converts to Post-9/11 (38 USC Chapter 33). He or she has 11 months of remaining benefits under Post-9/11 38 USC Chapter 33. If he or she does not exhaust these 11 months of benefits, no refund of the \$1,200, or amount contributed towards MGIB benefits, will be given.

4–11. Treatment of certain contributions under Montgomery GI Bill and Reserve Education Assistance Program (commonly called ‘Buy-Up’)

a. Soldiers who participated in the Buy-Up provision of MGIB or REAP will not receive the Buy-Up amount if they elect to use benefits under the Post-9/11 GI Bill. There is no provision to allow for a refund of any Buy-Up contribution.

b. There is no provision to allow for increasing the amount allowed for Post-9/11 GI through use of a Buy-Up.

4–12. Soldiers eligible for Montgomery GI Bill making an election to convert to the Post-9/11 GI Bill

The MGIB (38 USC Chapter 30) eligible Soldiers who elect to convert to the Post-9/11 GI Bill will be limited to receiving the number of their remaining unused months of MGIB benefits. The DVA has one exception to this rule. Only when the Soldier has used all 36 months of MGIB benefits will the DVA allow that Soldier to have 12 months of Post-9/11 GI Bill benefits. Example: A Soldier used 25 months of MGIB (38 USC Chapter 30) and converts to Post-9/11 GI Bill. They have 11 months of remaining benefits of Post-9/11 GI Bill benefits.

4–13. Soldiers who were eligible for benefits under Montgomery GI Bill, Montgomery GI Bill-Selected Reserve, or Reserve Education Assistance Program, and elect to use benefits under the Post-9/11 GI Bill

In addition to the educational benefits as described in paragraph 4–8f, Soldiers who were eligible for benefits under MGIB, MGIB–SR, or REAP, and elect to use benefits under the Post-9/11 GI Bill, will be eligible to receive benefits for on-the-job training, apprenticeship training, correspondence courses, flight training, preparatory courses, and national exams. Soldiers in these circumstances will be paid just like they would have under their ‘old’ GI Bill program (for example, money paid to them for tuition, not to the school), and they will not receive a living allowance and/or money for books. The Soldier must apply in writing to the DVA as the sole determination authority in such cases.

4–14. Eligible for Kickers under either Montgomery GI Bill or Montgomery GI Bill-Selected Reserve

Soldiers eligible for Kickers under either MGIB or MGIB–SR will remain eligible for the Kicker payment if they elect to use benefits under the Post-9/11 GI Bill. Kickers will be paid lump sum each term (for example, semester and quarter) and will be prorated based upon the monthly Kicker value that existed at the time of election. Note: Kicker does not transfer to dependents.

4–15. Transferability of unused benefits to dependents

For the purposes of transferability, Armed Forces include all AD service and all SELRES Service regardless of branch of Service or component. Soldiers whose request to transfer benefits is approved will incur an additional service obligation in accordance with the below policy. Soldiers are expected to serve the additional service obligation in the same component. However, if a Soldier is released or separated from that component prior to completion of the additional service obligation, transferred benefits will be revoked unless the Soldier agrees to serve the remaining period, or more, in another component. For example, a Soldier on AD requests to transfer benefits and incurs a 4-year additional service obligation. If the same Soldier later separates from AD prior to completion of the 4-year additional service obligation, the transfer of benefits will be revoked unless the Soldier transitions to ARNG or USAR and agrees to serve the remaining unserved obligation in the SELRES. Note: Soldiers can only transfer to their dependents while in service. A Veteran cannot transfer benefits to their dependents after separation or retirement from service. Benefits, transferred or not, by law, are not marital property.

a. Eligibility.

(1) Any Soldier of the Armed Forces who fulfills Post-9/11 GI Bill eligibility requirements and who, at the time of the approval of the Soldier’s request to transfer entitlement to educational assistance, does not have an adverse action flag if the Soldier:

(a) Has at least 6 years of service in the Armed Forces on the date of election and agrees to serve 4 additional years from the date of request, regardless of the number of months transferred; or

(b) Has at least 10 years of service in the Armed Forces on the date of election and cannot commit to 4 additional years due to an retention control point (RCP) or mandatory retirement date (MRD), provided the soldier commits to serve for the maximum amount of time allowed by either RCP or MRD as of the date of request, regardless of the number of months transferred; or

(c) Is on continuation on active duty orders. These Soldiers must commit to serve for the maximum amount of time allowed by their continuation on active duty approval; or

(d) Is being separated due to a disability as determined by a medical board (transfer may be approved upon issuance of separation orders)

1. Soldiers with more than 6 years but less than 10 years will need an exception to policy (ETP) to allow them to extend or reenlist for the four year service obligation required for transfer.

2. The ETP must be approved and the extension or reenlistment must be completed prior to a PEB unfit finding. Also, for soldier with over 10 years of service, an ETP is not required, but the soldier must submit the transfer request after the medical separation order is issued, but before its effective date; or

(e) Will become retirement eligible during the period from 1 August 2009 through 1 August 2013 and agrees to serve the additional period, if any, specified below. For the purposes of this paragraph, a Soldier is considered to be retirement eligible if he or she has completed 20 years of active Federal service or 20 qualifying years as computed under 10 USC 12732. Use whichever computation establishes 20 years regardless of which component the Soldier is in at the time of electing to transfer benefits.

1. Soldiers eligible for retirement on or before 1 August 2009 require no additional service.

2. Soldiers with an approved retirement date on or after 1 September 2009, but on or before 1 June 2010, require no additional service.

3. Soldiers who attain 20 years of service on or after 2 August 2009 and before 2 August 2010 require 1 year of additional service from the date of request.

4. Soldiers who attain 20 years of service on or after 2 August 2010 and before 2 August 2011 require 2 years of additional service from the date of request.

5. Soldiers who attain 20 years of service on or after 2 August 2011, and before 2 August 2012 require 3 years of additional service from the date of request.

6. Does not apply to any Soldier who retired on or before 1 August 2009 unless recalled to AD and serving on or after 1 August 2009 and before 2 August 2012. Those who retire on or before 1 August 2009 are, by law, not eligible to transfer unused Post-9/11 GI Bill benefits because their last day of duty will be 31 July 2009 and they will transfer to the retired list on 1 August 2009.

7. Soldiers who request to transfer Post-9/11 GI Bill benefits on or after 1 August 2013 must complete a 4-year service obligation.

(2) *The VA will not recoup paid benefits for:*

(a) Soldiers separated through a Service force-shaping initiative prior to completion of the required service. This includes Soldiers separated under the provisions of Qualitative Service Program or Temporary Early Retirement Authority (TERA).

(b) Soldiers separated under these programs may retain the transferred benefits without completing the service obligation if the transfer was completed prior to selection.

(c) Death, discharge for preexisting medical condition, hardship, and a physical/mental condition (not a disability) that interfered with duty.

(3) *Voluntarily or involuntarily separates.* A Soldier who voluntarily or involuntarily separates or is released from Armed Forces prior to completion of an agreed upon additional service commitment will have their transfer of benefits revoked by the VA. Benefits already used by a dependent will be recouped by the VA. This includes, but is not limited to, Soldiers separated under the provisions of Qualitative Management Program, Qualitative Retention Board, Active Service Management Board, or officers with two-time nonselection for promotion.

b. Eligible Family members.

(1) A Soldier approved to transfer unused Post-9/11 GI Bill benefits may transfer them to—

(a) The Soldier's spouse.

(b) One or more of the Soldier's children.

(c) A combination of the above.

(2) A Family member must be enrolled in the Defense Eligibility Enrollment Reporting System (DEERS) and be eligible for benefits at the time of transfer to receive transferred educational benefits. Children lose eligible dependent status upon turning age 21, or at marriage. Eligible dependent status can be extended from age 21 to age 23 only if the child is enrolled as a full-time student and unmarried (verified by DEERS). A child may be eligible if attending a VA-approved course less than full-time or in other programs (non-institute of higher learning, apprenticeship, correspondence, flight, or noncollege degree) and currently age 21 or 22; a request must be submitted in writing to the Soldier's approving official in such cases.

(a) A child's marriage after transfer of benefits is approved will not affect his or her eligibility to receive the educational benefit; however, after an individual has designated a child as a transferee under this section, the Soldier retains the right to revoke or modify the transfer at any time.

(b) If an eligible individual elects to transfer their entitlement to a spouse, a subsequent divorce will not affect the

transferee's eligibility to receive educational benefits; however, the Soldier retains the right to revoke or modify the transfer at any time.

c. Months of transfers. This is the number of months of benefits transferred by a Soldier under this section may not exceed the lesser of 36 months or the amount of unused benefits remaining as determined by the DVA.

d. Transferee usage . Prior to using transferred benefits, dependents must submit a request for a certificate of eligibility to the DVA. The form to fill out is VA Form 22-1990e (Application for Family Member to Use Transferred Benefits). Do not use VA Form 22-1990. That form is for Soldiers and Veterans only. Do not use VA Form 22-5490 (Dependent's Application for VA Education Benefits); that form is a request for eligibility of survivor benefits. The VA Form 22-1990e is located on the VONAPP Web site located at <http://vabenefits.vba.va.gov/vonapp/main.asp>. Dependents will need to establish their own user identification and logon password to access the VONAPP site. The site will walk them through the process. Dependent use of transferred educational benefits is subject to the following:

(1) A spouse—

(a) May start to use the benefit immediately after the Soldier making the transfer has completed at least 6 years of service in the Armed Forces.

(b) May use the benefit while the Soldier remains in the Armed Forces.

(c) Is subject to the same 15-year limitation as the Soldier (see para 4-5).

(2) A child—

(a) May start to use the benefit after the Soldier making the transfer has completed at least 10 years of service in the Armed Forces.

(b) May use the benefit while the Soldier remains in the Armed Forces.

(c) May not use the benefit until they have met the requirements of a secondary school diploma (or equivalency certificate), or reached 18 years of age.

(d) Is not subject to the 15-year time limitation, but may not use the benefit after reaching 26 years of age.

e. Nature of transferred entitlement. The entitlement transferred will be available as follows:

(1) A spouse is entitled to educational assistance under this chapter in the same manner as the Soldier from whom the entitlement was transferred.

(2) A child is entitled to educational assistance under this chapter in the same manner as the Soldier from whom the entitlement was transferred as if the Soldier were not on AD.

f. Designation of transferee. A Soldier transferring an entitlement to educational assistance under this section will:

(1) Designate the dependent or dependents they want to transfer unused benefits to;

(2) Designate the number of months of unused benefits transferred each to dependent; and

(3) Specify the period for which the transfer will be effective for each dependent.

g. Time for transfer, revocation, and modification.

(1) *Time for transfer.* A Soldier approved to transfer entitlement to educational assistance under this section may transfer such entitlement only while serving as a member of the Armed Forces when the transfer is executed.

(2) *Modification or revocation.*

(a) A Soldier transferring entitlement under this section may, while a member of the Armed Forces, modify or revoke at any time the transfer of any unused portion of the entitlement so transferred.

(b) A Soldier, while a member of the Armed Forces, may add new dependents, modify entitlement for existing dependents, or revoke entitlement while serving in the Armed Forces.

(c) A Veteran may modify entitlement or revoke entitlement among only those dependents that were designated to receive transferred benefits prior to separating from the Armed Forces. Veterans who transferred entitlement prior to separating or retiring from the Armed Forces may not add new dependents after separation or retirement.

(d) The modification or revocation of the transfer of entitlement under this paragraph will be made by submitting notice of the action to both the Army via the Transferability of Education Benefits (TEB) Web site and the Secretary of Veterans Affairs as determined by the DVA. After separation or retirement, modifications or revocations must be done by submitting notice to the DVA only.

h. Additional administrative matters.

(1) The use of any entitlement to educational assistance transferred will be charged against the entitlement of the Soldier making the transfer at the rate of 1 month for each month of transferred entitlement that is used.

(2) The death of a Soldier who transferred benefits will not affect the use of the entitlement by the dependent to which the entitlement was transferred. Benefits cannot be transferred after death.

(3) A dependent to whom the entitlement is transferred may use the entitlement for the pursuit and completion of the requirements of a secondary school diploma (or equivalency certificate).

(4) In the event of an overpayment of educational assistance with respect to a dependent to which entitlement is transferred, the dependent and the Soldier making the transfer will be jointly and separately liable for the amount of the overpayment. The DVA is responsible for recouping overpayment of benefits.

(5) Once a Soldier transfers Post-9/11 GI Bill benefits, the Soldier commits to the additional service outlined in applicable Army policy guidance. If the benefit has not been used and the Soldier voluntarily revokes all transferred

benefits, the Soldier may request to remove the required additional service obligation. Requests to remove the service obligation will be approved on a case-by-case basis. A Soldier will be required to serve the full service obligation once any transferred months are used by a dependent

(6) The amount of any transferred entitlement that is used by a dependent of the Soldier as of the date of failure to complete the service agreed to by the Soldier, will be treated as an overpayment of educational assistance and will be subject to collection by DVA. Exceptions:

(a) The death of the Soldier.

(b) Discharge or REFRAD for a medical condition that pre-existed the service of the Soldier and was not service connected.

(c) Discharge or REFRAD for hardship.

(d) Discharge or REFRAD for a physical or mental condition not a disability and that did not result from the Soldier's own willful misconduct, but did interfere with the performance of duty.

(e) The DVA has agreed to not recoup paid benefits or revoke transferred benefits for Soldiers who have agreed to an additional service commitment and who did not complete the agreed upon service due to separation for medical disability or through a Service force shaping initiative.

(7) A Soldier who separates or is released from Armed Forces prior to completion of an agreed upon additional service commitment will have his or her transfer of benefits revoked by the DVA. Benefits already used by a dependent will be recouped by the DVA. However—

(a) If the Soldier was Regular Army, the Soldier, if eligible, may join a SELRES unit and regain the eligibility to transfer benefits if the Soldier agrees to serve at least the remaining length of time which was not served under the original agreement. This will not prevent recoupment by the DVA of previously paid benefits.

(b) If the Soldier was in a SELRES unit, that Soldier may, if eligible, join the Active Component and regain the authority to transfer benefits if the Soldier agrees to serve at least the remaining length of time which was not served under the original agreement. This will not prevent recoupment by the DVA of previously paid benefits.

i. Procedures. All requests and transactions will be completed through the TEB Web application at <http://milconnect.dmdc.mil>. The TEB Users Manual will be located on the Web site and will provide instruction for enrollment, verification, additions, changes, and revocations. TEB will be pre-populated with the Soldier's personal information, and eligible dependent information. All dependents will be viewable but only spouse and eligible dependent children who are recorded in DEERS as being eligible for DEERS benefits at the time of submitting a request to transfer will be able to have benefits transferred to them. Soldiers are responsible for correcting inaccurate information. Soldiers are responsible for ensuring a dependent is eligible at the time of submitting a request to transfer benefits. Soldiers are solely responsible for ensuring dependent eligibility data in DEERS is correct. Soldiers may request certification of eligibility for Post-9/11 GI Bill benefits at the DVA's Web site prior to requesting to transfer benefits but it is not required as a precondition of submitting a request to transfer benefits. Enlisted Soldiers who submit a request to transfer benefits must notify their unit enlisted career counselor that they submitted a request to transfer benefits. If the unit or organization to which an enlisted Soldier is assigned does not have an assigned enlisted career counselor, the career counselor supporting that unit or organization must be notified. Army competitive category colonels and lieutenant colonels (promotable) who submit a request to transfer benefits must notify their human resource manager after the request is submitted. Acquisition Corps officers who submit a request to transfer benefits must notify their career management branch after the request is submitted.

(1) *Transfer request submission.*

(a) All requests to transfer benefits must be submitted on the TEB Web site.

(b) The TEB Web site will require Soldiers to use a common access card or to establish a logon identification and password in order to access the site before they can complete the request.

(c) Soldiers can access the TEB Web site after submission of their request to monitor the status of their request.

(d) Soldiers must use the TEB Web site to modify or revoke transferred benefit amounts as well as to add a new dependent. If a Soldier adds a new dependent after the initial request is approved, there is no additional service requirement for adding new dependents. However, the original additional service commitment will remain in effect.

(e) In the case of ARNG Soldiers, a Post-9/11 Educational Benefits Transferability Commitment and Statement of Understanding must be completed and signed prior to transfer approval. The Transferability Commitment and Statement of Understanding will populate for the individual Soldier online at: <https://minuteman.ngb.army.mil/benefits> upon completion of the TEB request. It is the Soldier's responsibility to print, complete, sign, and then upload the completed statement back to the same site. A completed copy can also be submitted via postal mail to Education Support Center, Post-9/11 GI Bill, P.O. Box 46, Camp Robinson, North Little Rock, AR 72199-0001 or faxed to 501-212-4942. All completed copies will be retained on the individual Soldiers' page in the Information Management and Reporting Center.

(2) *Site security management.*

(a) The DCS, G-1 (DAPE-MPE-PD) is the Active Component TEB site security manager.

(b) The CNGB is the transferability of education benefits (TEB) site security manager, and may delegate the function to the Director, Army National Guard (DARNG). The DARNG may further delegate the function.

(c) The CAR is the TEB site security manager for the USAR. This responsibility may be delegated as determined by the CAR.

(3) *Certification* Army certifying officials will verify that the Soldier requesting to transfer benefits is in compliance with the transferability policy provisions. Certifying officials are responsible for ensuring that the Soldier requesting to transfer benefits has at least 6 years of service in the Armed Forces, has sufficient time remaining in the Army to meet the appropriate additional service requirement, and, if necessary, reenlists for additional service sufficient to meet the appropriate additional service requirement prior to certifying a request to transfer benefits. Certifying officials will take appropriate action, as specified by their commander, to ensure appropriate automated personnel systems (Total Officer Personnel Management Information System and Enlisted Distribution and Assignment System for the Active Component, RC systems as directed by the CNGB or CAR) are updated to show the beginning and end date of the additional service commitment. Service certifying officials are not responsible for ensuring a Soldier's dependent information is correct. Service certifying officials will record the required ending date of any additional service, that is required in TEB prior to certification.

(a) The primary certifying official for AD enlisted Soldiers is the unit career counselor. However, all career counselors require certifying official authorization and access. The DCS, G-1 through career counselor channels, will control service certifying official access to TEB. Access to TEB will be coordinated between the DCS, G-1 and all commands. Senior career counselors for Army commands, Army service component commands, and direct reporting units are responsible for identifying career counselors who will serve as certifying officials within their commands.

(b) The certifying official for Active Component general officers will be determined by the Chief, General Officer Management Office.

(c) The certifying official for Active Component colonels will be determined by Chief, Colonels Management Office.

(d) The certifying official for Active Component officers in the rank of second lieutenant to lieutenant colonel and warrant officer one to chief warrant officer five is the HRC Education Incentives Branch.

(e) The certifying official for ARNG Soldiers will be determined by the Chief, ARNG.

(f) The certifying official for the USAR Soldiers will be determined by the CAR.

(g) The certifying official for Judge Advocate General officers will be determined by TJAG.

(h) The certifying official for chaplains will be determined by the CCH.

(i) The certifying official for U.S. Army Medical Department (AMEDD) commissioned and WOs will be determined by TSG.

(j) Personnel identified as certifying officials will be reported to the DCS, G-1 (DAPE-MPE-PD); Chief, ARNG; or CAR.

(4) Once certifying officials have approved a request to transfer benefits, Soldiers may print a hard copy of the certified TEB request for their personal records. Additional service commitments will be recorded in the appropriate personnel system(s) (for example, Total Officer Personnel Management Information System, and Enlisted Distribution and Assignment System). Additional service commitments resulting from transferring unused Post-9/11 GI Bill benefits begin on the date of request and are served concurrent with any other additional service commitment in effect at the time of the transfer or incurred at any time after the request to transfer benefits. Transfer of Post-9/11 GI Bill benefits, in and of itself, will not limit any other reenlistment option or incentive to which a Soldier may be eligible.

(5) The DVA will verify that Soldiers are entitled to the total number of months of benefits that a Soldier requests to transfer. In the event a Soldier requested to transfer more months of Post-9/11 GI Bill benefits than to which entitled, the Soldier may, within 30 days from date of notification from the DVA, revoke the transfer of unused benefits and rescind the additional service obligation unless already serving on a term of reenlistment. If the Soldier elects to modify the number of months transferred to match the total number of months the DVA determined is available, the original additional service commitment will remain in effect.

4-16. Army College Fund and Reenlistment Kickers

The Post-9/11 GI Bill may be enhanced through an increased monthly basic educational assistance allowance, known as Kickers, to enhance recruitment and retention. Soldiers who receive an ACF Kicker under MGIB and who convert their MGIB to the Post-9/11 GI Bill will be entitled to receive their ACF Kicker under the Post-9/11 GI Bill.

a. Enlistment Kicker policy is managed in the HQDA incentives message(s) issued by the DCS, G-1 (DAPE-MPA-CB).

(1) The monthly amount of educational assistance under the Post-9/11 GI Bill may be increased for Soldiers who initially enlist in a Regular Component in a skill or specialty in which there is a critical shortage of personnel or for which it is difficult to recruit.

(2) The use of enlistment Kickers is based on the criticality of the skill and/or the length of enlistment commitment and may be offered in amounts from \$150 per month to \$950 per month in increments of \$100.

b. Affiliation Kicker policy is managed by the DCS, G-1 (DAPE-MPA-CB).

(1) The monthly amount of educational assistance under the Post-9/11 GI Bill may be increased for a Soldier who is separating honorably from the Regular Component and who agrees to serve in the SELRES in a skill, specialty, or unit

in which there is a critical shortage of personnel or for which it is difficult to recruit and/or retain. These increases in the monthly amount are known as affiliation Kickers.

(2) The use of affiliation Kickers should be based on the criticality of the skill and/or unit and the length of SELRES commitment, and may be offered in amounts from \$150 per month to \$950 per month in increments of \$100. If a Soldier is already eligible for an enlistment Kicker, the amount of the affiliation Kicker is limited to a combined maximum amount of \$950. For those Soldiers who are offered an affiliation Kicker on top of an enlistment Kicker, the increases will be in \$100 increments.

c. Reenlistment Kicker policy is managed by the DCS, G-1 (DAPE-MPE-PD).

(1) The monthly amount of educational assistance under the Post-9/11 GI Bill may be increased for a Soldier who, after completing the initial term of service, elects to remain on AD for a period of at least 2 years. These increases in the monthly amount are known as reenlistment Kickers.

(2) The use of reenlistment Kickers should be based on the criticality of the skill and may be offered in amounts from \$100 per month to a maximum \$300 per month in increments of \$100, based on length of additional service. A reenlistment Kicker is in addition to any enlistment or affiliation Kicker and could enable a Soldier to receive a total Kicker exceeding \$950 per month if the Soldier has received an enlistment and/or affiliation Kicker.

d. Kickers are paid in conjunction with the monthly living stipend, Soldiers eligible for Kickers should be aware of the limitations on payment.

(1) No ACF Kicker payment will be provided for education pursued on half-time basis or less.

(2) No ACF Kicker payment will be provided for education and/or training pursued solely through distance learning.

(3) No ACF Kicker payment will be provided for use while serving on AD.

Chapter 5

Regular Army Loan Repayment Program

5-1. Authority

a. 10 USC 2171.

b. LRP is an enlistment incentive designed to increase Regular Army Test Score Category I-III.A. accessions.

5-2. Eligibility

The Soldier must—

a. Be a NPS accession.

b. Enlist between 1 December 1980 through 30 September 1981 or after 30 September 1982.

c. Enlist possessing a high school diploma.

d. Enlist for no less than a 3-year term of service.

e. Obtain an AFQT score that meets recruitment requirements at time of entry on AD.

f. Receive a loan that was made, insured, or guaranteed under Title IV, Part B, D, or E of the Higher Education Act before entering AD. The loan must not be in default and must remain in good standing while on AD. Loans qualifying for repayment are:

(1) Guaranteed Student Loans and/or Stafford Loans.

(2) National Direct Student Loans/Perkins Loans.

(3) Supplemental Loans for students.

(4) Federal Insured Student Loans.

(5) Parent Loan for Undergraduate Students - only loans incurred for the use of individual contracting for the LRP.

(6) Auxiliary Loan Assistance for Students.

(7) Consolidated Loans - only loans incurred for the use of individual contracting for the LRP.

(8) As of 1 January 2006, 10 USC 2171 was amended to include any loan incurred for educational purposes made by a lender that is—

(a) An agency or instrumentality of a State.

(b) A financial or credit institution (including an insurance company) that is subject to examination and supervision by an agency of the United States or any State.

(c) From a pension fund or a nonprofit private entity (subject to case-by-case review/approval by Commander, U.S. Army Human Resources Command (AHRC-PDE-I) (Department 410), 1600 Spearhead Division Avenue, Fort Knox, KY 40122-5401 or DCS, G-1 (DAPE-MPE-PD)).

g. Must provide the Army with a qualifying loan promissory note or statement from loan servicing agency that verifies the loan type before entering AD.

h. Must contract as a member in an officer candidate program or contract for a selected MOS and remain qualified in the selected MOS and/or program. The term of service that an individual enlists for is dictated by the parent MOS.

In no case may the term of service be less than 3 years. Eligible LRP MOSs are subject to change based on the recruiting environment. Refer to DCS, G-1 messages for MOS changes.

- i.* Must disenroll from the MGIB.

5-3. Processing Loan Repayment Program eligibles for enlisted members, including Officer Candidate School enlistment option and In-Service Officer Candidate School candidates

For specific enlistment procedures, refer to AR 601-210. For ROTC cadets, follow procedures in paragraph 5-4. Processing procedures outlined below supplement AR 601-210. USAREC/HRC—

- a.* Ensures accuracy of data entered on DD Form 1966/1, items 17e and 18k.
- b.* Indicates on DA Form 3286 (Annex B or DEP OUT) that LRP is selected as an option.
- c.* Initiates DD Form 2366 by completing—
 - (1) Items 1 and 2 for all accessions.
 - (2) Item 5 on the DD Form 2366 is for decision to disenroll. These individuals will not be eligible to enroll in the MGIB at a later date, nor will they be allowed to enroll during a subsequent term of service. The Post-9/11 GI Bill may be awarded after a subsequent period of qualifying service. Since rules are subject to change, the VA Web site at www.va.gov can be used to verify eligibility and rules for the Post-9/11 GI Bill.
- d.* Counsels Soldier regarding taxation and the importance of maintaining their records. Provides Soldier with complete packet, which includes copies of the following:
 - (1) LRP contract (DA Form 3286 (Annex B or DEP OUT)).
 - (2) Loan promissory note(s) or statement from loan servicing agency that indicates loan type.
 - (3) DD Form 1966/1.
 - (4) DD Form 2366.
 - (5) A copy of the request for deferment, administrative forbearance, or repayment plan letter sent to loan servicing agency.
 - (6) A completed and signed copy of all applicable forms.
- e.* Forwards DD Form 2366 to reception battalion with the accession packet.
- f.* Assists Soldiers awarded the LRP in securing a deferment or administrative forbearance from loan servicing agency on all qualifying loans and ensures the applicant understands the Army does not assume the loan.
- g.* Provides HRC (AHRC-PDE-I) with a listing of all eligible participants monthly.

5-4. Processing Loan Repayment Program eligibles for Reserve Officers' Training Corps Cadets

For specific enrollment procedures, refer to AR 601-210. For OCS candidates, follow procedures in paragraph 5-3. Processing procedures outlined below supplement AR 601-210.

- a.* Ensures accuracy of data entered on DD Form 4/1 (Enlistment/Reenlistment Document - Armed Forces of the United States), item A2.
- b.* Initiates DD Form 2366 by completing—
 - (1) Items 1 and 2 for all accessions.
 - (2) Item 5 on the DD Form 2366 is for decision to disenroll. These individuals will not be eligible to enroll in the MGIB at a later date, nor will they be allowed to enroll during a subsequent term of service. The Post-9/11 GI Bill may be awarded after a subsequent period of qualifying service. Since rules are subject to change, the VA Web site at <http://www.va.gov> can be used to verify eligibility and rules for the Post-9/11 GI Bill.
- c.* Ensures the additional ADSO is recorded and appropriately entered in all applicable personnel databases, to include Cadet Command Information Management System and iPERMS.
- d.* Counsels Soldier regarding taxation and the importance of maintaining their records. Provides Soldier with complete packet, which includes copies of the following:
 - (1) Loan promissory note(s) or statement from loan servicing agency that indicates loan type.
 - (2) DD Form 4/1.
 - (3) DD Form 2366.
 - (4) A copy of the request for deferment, administrative forbearance, or repayment plan letter sent to loan servicing agency.
 - (5) A completed and signed copy of all applicable forms.
- e.* Forwards DD Form 2366 to HRC with the accession packet.
- f.* Assists Soldiers awarded the LRP in securing a deferment or administrative forbearance from loan servicing agency on all qualifying loans and ensures the applicant understands the Army does not assume the loan.
- g.* Provides HRC (AHRC-PDE-I) with a listing of all eligible participants monthly. The listing will specify each participant's:
 - (1) Name.
 - (2) ADSO.

- (3) MOS and/or area of concentration.
- (4) AKO email address.

5-5. Student loan deferment and/or forbearance

a. Enrollment in the LRP does not exempt a Soldier from the obligation to repay the loan. The Soldier remains responsible for securing a deferment or administrative forbearance from the loan servicing agency. The letter by itself does not secure a deferment or administrative forbearance. The loan servicing agency must acknowledge and approve all requests for deferments or administrative forbearances. Loans incurred on or after 1 July 1993 are no longer eligible for deferment. Some federally insured loans incurred on or after 1 July 1993 are eligible for an administrative forbearance. Loan agencies are required by Federal law to forbear mandatorily any and all federally insured student loans that are on SLRPs administered by the DOD under 10 USC 2171. Soldiers, however, must fill out and submit the required forms. The Soldier is responsible for all payments toward interest and ensuring the loan remains in good standing.

b. Loan status is the borrower's responsibility.

(1) The Army does not assume an individual's student loan; the individual remains responsible for the status of the loan. Individuals whose loan holders are requesting repayment must contact their loan holder to request a deferment or forbearance.

(2) In some cases, the deferment will stop interest (which the Army will not repay) from accruing, and the forbearance prevents payments from coming due on a student loan. A deferment or forbearance will also prevent a loan from delinquency or default. Conditions under which deferments or forbearance are obtained are handled solely between the borrower and the loan holder. Responsibility rests with the borrower to request the deferment, forbearance, or ensure their loan remains in good standing.

(3) There are many loans that do not qualify for a deferment or forbearance and payments will be the responsibility of the borrower.

5-6. Loans in default

The Army will not repay loans or portions of loans that are in default or make payments on delinquent accounts. The Army will not pay interest (including capitalized interest), nor will the Army pay any associated charges or fees. The Army will not reimburse Soldiers for payments made by them or any other individual.

5-7. Entitlements

a. LRP Soldiers earn benefits under the program in the following way: For each year of initially contracted service that is honorably served, the Army will repay 33 and 1/3 percent or \$1,500, whichever is greater, of the remaining original unpaid principal as verified by the loan servicing agency. The maximum dollar amount reimbursable under the LRP is DA imposed.

b. The Army will not pay more than the outstanding principal amount borrowed or the remaining original unpaid principal (which may be less than the principal borrowed if payments have already been made) as verified by the loan servicing agency when the Soldier enters AD.

c. The Army will make payments directly to the loan servicing agency.

d. Payments are subject to Federal and State income taxes as taxable income in the year repayment is made. The DFAS will send Soldier a Form W-2 (Wage and Tax Statement) separate from the Form W-2 received for military pay. A percentage of the LRP payment will be withheld; therefore, it is important that the Soldier file income taxes with this Form W-2. Since payments are considered income, this withholding will result in an additional tax bill at the end of the year. There is potential that the money or portions of the money taken may be refunded by the Internal Revenue Service. This refund may be used to make a payment on your student loans.

5-8. Special conditions

a. Soldiers who do not complete their initial term of service may qualify for prorated credit if they—

- (1) Complete at least 1 full year of enlisted service; and
- (2) Separate for certain COG, hardship, or service-connected disability.

b. Final determination of prorated credit will be made by HRC- Education Incentives Branch .

c. Soldiers who extend their initial 2-year enlistment may receive the appropriate credit based on the length of the extension. Reenlistment is not considered an extension of service.

d. Soldiers who reenlist will not receive additional payments.

5-9. Processing payments

USAREC and/or HRC processes LRP eligible participants and forwards the listing of eligible participants monthly as outlined in paragraphs 5-3*d* and 5-4*c* to HRC (Finance and Incentives Branch).

a. HRC (AHRC-PDE-I) will—

- (1) Ensure eligibility for LRP.

- (2) Forward to the Soldier, officer candidate, or cadet a LRP packet that includes the following:
 - (a) Letter of instruction.
 - (b) DD Form 2475 (DOD Educational Loan Repayment Program (LRP) Annual Application).
- (3) Create a suspense file to ensure that Soldiers have received the packets.
- b. The Soldier or officer (upon the first anniversary date and each year afterward based on the loan repayment period contract)—
 - (1) Follows the letter of instruction.
 - (2) Initiates DD Form 2475 loan repayment application up to 90 days prior to the SLRP anniversary date.
 - (3) Completes DD Form 2475, items 2 and 3.
 - (4) Forwards DD Form 2475 to the loan servicing agency.
 - (5) Ensures the loan repayment process has begun. Follows-up with lenders and HRC (AHRC-PDE-I) to ensure receipt of all completed DD Forms 2475.
 - c. The loan servicing agency will be asked to—
 - (1) Complete DD Form 2475, item 4.
 - (2) Forward DD Form 2475 to the address stated on DD Form 2475, item 1.
 - d. Upon receipt of completed DD Form 2475, HRC (AHRC-PDE-I) will—
 - (1) Verify the eligibility of loan.
 - (2) Prepare the paperwork for loan repayment.
 - (3) Input the payment plan into the LRP database.
 - (4) Verify loan amount, annually.
 - e. Upon completion of each full year of AD—
 - (1) HRC (Finance and Incentives Branch), with oversight by HRC, G-3—
 - (a) Authorizes DFAS to issue appropriate LRP payment.
 - (b) Sends a letter to the Soldier or officer stating that DFAS has been authorized to pay the loan in accordance with guidance in the Soldier's original enlistment contract.
 - (c) Ensures a record of LRP processing is placed into the individual's iPERMS file.
 - (2) DFAS—
 - (a) Issues the check to the loan servicing agency within 90 days of receipt of HRC notification.
 - (b) Provides verification of disbursement to HRC.
 - (c) Issues Soldier or officer a separate Form W-2 indicating amount paid less taxes.
 - (d) Notifies Internal Revenue Service of the amount paid less taxes.
 - f. DD Forms 2475 will not be used for requesting multiple year payments. Additionally, no more than one payment will be executed per loan servicing agency per year.
 - g. Payment may not be made on a loan that is in default. Payment may be resumed when the loan returns to good standing but will not be made for the time that the loan was in default
 - h. When Soldiers or officers separate from AD earlier than the initial enlistment term, they must provide HRC, Finance and Incentives Branch with:
 - (1) Copy 4 of DD Form 214. Note: Submission of DD Form 214 will facilitate possible future payments toward qualifying loans. Individuals separating to become a commissioned officer must also submit the DD Form 214 to ensure continuation of payments.
 - (2) Current mailing address.

5-10. Resolution of discrepancies

- a. If the loan servicing agency has not received payment within 90 days after notification from HRC, Finance and Incentives Branch, the Soldier or officer will—
 - (1) Initiate DA Form 2142 (Pay Inquiry) through the local FAO.
 - (2) Include transmittal number (found in notification letter from HRC as noted in paragraph 5-9e(1)(b)).
- b. Soldiers or officers who believe they contracted for the LRP option but have not received a letter from HRC by the eighth month of their first year on AD should provide HRC with copies of the following
 - (1) DA Form 3286 (Annex B or DEP OUT).
 - (2) DD Form 1966/1 (or DD Form 4/1).
 - (3) DD Form 2366.
 - (4) Promissory notes or statement from loan servicing agency indicating loan type.
 - (5) A letter of explanation stating reasons and circumstances that justify eligibility, including name, social security number, AKO address, and a return address. Note: Veterans must submit, in addition to the above, copy 4 of DD Form 214.

c. All Regular Army LRP questions must be sent to Commander, U.S. Army Human Resources Command (AHRC-PDE-I) (Department 410), 1600 Spearhead Division Avenue, Fort Knox, KY 40122-5401.

Chapter 6

Student Loan Repayment Program - Reserve Components (U.S. Army and Army National Guard)

6-1. General

a. This chapter provides policy and guidance for the administration of the SLRP. The SLRP is authorized under 10 USC 16301, which establishes the SLRP for qualified SELRES personnel. Subject to the provisions of this chapter, the following outstanding loans qualify for repayment.

b. Eligible loans include the following:

(1) Any loan made, insured, or guaranteed under part B of Title IV of the Higher Education Act of 1965 (Federal Stafford Loans, 20 USC 1071);

(2) Any loan made under part D of Title IV of the Higher Education Act of 1965 (William D. Ford Federal Direct Loan Program, 20 USC 1087a);

(3) Any loan made under part E of the Higher Education Act of 1965 (Federal Perkins Loans, 20 USC 1087aa.

(4) Any loan incurred for educational purposes made by a lender that is—

(a) An agency or instrumentality of a State;

(b) A financial or credit institution (including an insurance company) that is subject to examination and supervision by an agency of the United States or any State; or

(c) From a pension fund or a non-profit private entity (subject to case-by-case review and approval by HRC (HRC-PDE-EI)).

c. Selection of the SLRP incentive must be accomplished by the applicant when he or she signs a SELRES contractual agreement as described in the following paragraphs.

d. Applicant may select the SLRP incentive even though he or she has no outstanding loan(s) when signing the contractual agreement. RCs may further limit scope of their SLRPs through annually approved Selected Reserve Incentive Program (SRIP).

e. The SLRP is not authorized in conjunction with the officer and WO affiliation or accession bonus. In all other cases the SLRP may be combined with other SRIPs, subject to eligibility criteria of each program offered.

6-2. Eligibility

To be eligible for the SLRP incentive, a person must contractually obligate himself or herself to serve satisfactorily per AR 135-91. A person must serve in the SELRES for the full term of the contractual agreement. Continued receipt of the SLRP or MGIB-SR on transfer from ARNGUS to the Army Reserve or from the AR to the ARNGUS will be managed in accordance with AR 601-210. An eligible Soldier is one who—

a. Contracts to serve in the SELRES of the ARNGUS or USAR in a MOS or unit authorized under the SRIP.

b. Executes DA Form 5261-4 (Student Loan Repayment Program Addendum) or NGB Form 600-7-5-R-E (ARNG Student Loan Repayment Program Addendum) on the same date of the Service contractual agreements (DD Form 4, DA Form 4836 (Oath of Extension of Enlistment or Reenlistment) or assignment order).

(1) Once a Soldier has enlisted, reenlisted, extended, or transferred from the Active Army with a remaining military service obligation (RMSO), and executed a DA Form 5261-4 or ARNG addendum to participate in the SLRP, the provisions of the DA Form 5261-4 or ARNG addendum will remain in force until the earlier occurrence of one of the following:

(a) Participation in the SLRP is terminated in accordance with this regulation.

(b) The maximum SLRP benefit as appropriate has been paid.

(2) Continuous service through reenlistment, extension, or reappointment does not require the execution of a new DA Form 5261-4.

(3) A Soldier is authorized to continue receipt of the SLRP incentive upon transfer between the RC of the Army (ARNGUS and USAR.) This does not constitute a Soldier's receipt of any additional benefits. The incentive is only authorized one time and only for the amount of the initial agreement. The amount a Soldier receives from one RC, or under one enlistment, will be subtracted from the maximum amount authorized. The remaining balance will be the amount authorized to be received from the gaining RC or new enlistment.

c. Enlists, reenlists, immediately or indefinitely reenlists, extends, is appointed, or is reappointed in the SELRES per AR 140-111, AR 601-210, AR 601-280, or NGR 600-200.

d. If contracting for a term of service in the SELRES as—

(1) A NPS Soldier must meet requirements listed in AR 601-210.

(2) A PS or in-service Soldier must meet requirements listed in AR 601–210. Additionally—A Soldier who is reenlisting or extending to qualify for MGIB–SR may contract to participate in the SLRP, if eligible, but must take sufficient time to meet MGIB–SR requirements per this regulation. In this case, the Soldier is not required to be within a specified period prior to a current ETS date.

(3) For a Soldier REFRAD from the Active Army, with a RMSO upon reassignment to a USAR and/or ARNG TPU contracted by TPU officials for SLRP, the following applies:

(a) May not be contracting for SELRES service to gain entitlement to increased educational assistance under the Montgomery GI Bill (MGIB–SR) 2x4 Program.

(b) Upon transfer into the USAR/ARNG has at least 3 years remaining on their statutory military service obligation.

(c) Soldiers who transfer into a TPU who have less than 3 years (6 years for ARNG) remaining on their RMSO must reenlist for a term of service that is by whole years, equal to or greater than the remaining term of the RMSO (but not less than 3 years) per AR 140–111.

(d) Must be qualified and have been awarded the MOS in which contracting; or agree to retrain in a critical MOS vacancy announced by HQDA or per respective RC annual SRIP that is the same required by the position vacancy for which enlisting.

e. Is not contracting to qualify for a permanent military technician position where membership in the SELRES is a condition of employment (includes temporary technician for over 179 days on any one tour and indefinite technician).

f. Has participated satisfactorily for 1 year in the SELRES. The loan(s) must be at least 1-year old on the Soldier's anniversary date before payment will be made.

g. Is not entering an AGR status after 2 August 2008.

6–3. Counseling

a. Commanders will ensure Soldiers contracting for the SLRP have been counseled by a service representative regarding the Soldier's obligations and responsibilities as cited on DA Form 5261–4 or ARNG addendum.

b. Commanders should ensure the Soldier is aware that SLRP payments are taxable and it is the Soldier's responsibility to—

(1) Make arrangements for deferment or forbearance with lenders or note holders on loans which are falling due; and

(2) Initiate the request for loan(s) repayment during each year the Soldier meets the requirements cited on DA Form 5261–4 or ARNG addendum by completing DD Form 2475. See paragraph 6–5 for payment processing.

6–4. Entitlement

a. The maximum amount of the loan(s) is defined by the respective RC as authorized under their annually approved SRIP.

(1) USAR and ARNG maximum amounts may differ.

(2) Once established, the maximum SLRP incentive available throughout a Soldier's service as an Army RC member (ARNG and USAR combined) cannot be increased unless authorized by Deputy Chief of Staff, G–1 (DAPE–MPA–CB), 300 Army Pentagon, Washington DC 20310–0300.

b. For each year of satisfactory service in the SELRES, the loan amount to be repaid will be as follows:

(1) If the amount of the loan(s) does not exceed the designated maximum portions, as authorized under paragraph 6–4a, the amount of annual repayment, inclusive of principal and interest, will not exceed 15 percent of the loan amount or \$500, whichever is greater.

(2) If the amount of the loan(s) exceeds the designated maximum portions, as authorized under paragraph 6–4a, the amount of annual repayment, inclusive of principal and interest, is 15 percent of the designated maximum portions.

6–5. Payment processing

a. Each Army component follows a different procedure for processing SLRP payments. Common procedures across all components are as follows:

(1) Once approved for the program, Soldiers will be notified 90 days prior to their anniversary date of contracting for SLRP, and will initiate DD Form 2475 loan repayment application within that 90 day window.

(2) Submission of application will be within 90 days prior to and up to 275 days after the anniversary date, if seeking to pay principal and interest for eligible loans.

(3) A DD Form 2475 received more than 275 days after the SLRP anniversary date will allow payment of principal only for loans originally eligible on that date.

(4) Payments may be claimed for up to 6 years in accordance with the Barring Act, 31 USC 3702. Claims beyond 6 years will be processed through the Army Board for Correction of Military Records. Full information is available at <http://arba.army.pentagon.mil/index.cfm>.

(5) Personnel separated from service requesting SLRP payment see paragraph 6–11d.

(6) Multiple year payments are eligible to be used on the current year DD Form 2475s, provided that Service members' loans are not in default at time of payment.

(7) Payment may not be made on a loan that is in default. Payment may be resumed when the loan returns to good standing but will not be made for the time that the loan was in default.

b. Soldiers may obtain their most current loan information from the National Student Loan Data System (NSLDS) Web site and submit the report in lieu of having the lending agency fill out the DD Form 2475. The NSLDS is the U.S. Department of Education's central database for student aid. It receives data from schools, agencies that guaranty loans, the Direct Loan program, the Pell Grant program, and other U.S. Department of Education programs. NSLDS provides a centralized, integrated view of Title IV loans and Pell grants that are tracked through their entire cycle; from aid approval through closure. In following paragraphs, this will be referred to as the "NSLDS option".

c. Regular Army procedure for processing payments is as follows:

(1) The unit or S1/G1 will complete Part 1 of DD Form 2475 and give the form to the Soldier.

(2) Soldier will complete Parts 2 and 3 of DD Form 2475 and surrender the form to the Soldier's S1/G1 or unit administrator.

(3) The lending agency will complete Part 4 of DD Form 2475 and return the form to the unit or S1/G1 personnel section. If the NSLDS option is used this step can be skipped.

(4) When the DD Form 2475 is received back from the lending agency (or the NSDLDS option is used), it will be forwarded to finance for processing.

d. ARNG procedure for processing payments is as follows:

(1) The ARNG unit or S1/G1 will complete Part 1 of DD Form 2475 and give the form to the Soldier.

(2) Soldier will complete Parts 2 and 3 of DD Form 2475 and surrender the form to the Soldier's S1/G1 or unit administrator.

(3) 30 days prior to the date of entitlement, Soldier will provide updated loan information from the Department of Education (DOE) via the National Student Loan Data System (NSLDS).

(4) Applicable documents are uploaded in the Guard Incentives Management System (GIMS).

(5) Designated State Incentives Manager (SIM) will review eligibility and loan information and will complete the payment schedule in GIMS.

(6) Designated National Guard Bureau official will review the eligibility and loan information in GIMS, review the payment schedule and submit the payment request to DFAS.

(7) See ARNG SRIP and corresponding NGB regulations for additional guidance.

e. USAR procedure for processing payment is as follows:

(1) Soldier will log into Web Enabled Benefit Education System by navigating to <https://rcms.usar.army.mil/> Education to access the LRP homepage to initiate the DD Form 2475 for the annual loan repayment application.

(2) Soldier will go to the 'my loan repayment' homepage and the 'manage loans' tab to load lender contact information, promissory notes, and disbursement information. 90 days prior to Soldier's entitlement date each year, the system will unlock for the Soldier to print the DD Form 2475. Note: Only system generated DD Forms 2475 will be processed.

(3) Soldier will print DD Form 2475, sign form, and send directly to the lender. The lender will complete Section 4 and forward to the pay center. Payment processing will take approximately 4 to 6 weeks.

(4) Soldier will continue to check online account and AKO periodically for payment status, updates, and messages from the pay center.

(5) See USAR SRIP and corresponding USAR regulations for additional guidance.

f. USAR IMA Soldier procedure for processing payment is as follows:

(1) The U.S. Army Reserve Command (USARC) (AFRC-CIE) will complete Part 1 of The DD Form 2475 and give the form to the Soldier.

(2) Soldier will complete Parts 2 and 3 and send the form to HRC. USARC (AFRC CIE) will send the form to the appropriate lending agency.

(3) The lending agency completes Part 4 and returns the form to USARC. USARC will send the IMA Soldier's completed form to the appropriate USAR pay center office.

(4) IMA Soldiers must provide a copy of the IMA assignment orders.

(5) See USAR SRIP and corresponding USAR regulations for additional guidance.

6-6. Continued receipt of Student Loan Repayment Program incentives

Continued receipt of SLRP incentives will be in accordance with DoDI 1205.21, and AR 601-210.

6-7. Reinstatement of Student Loan Repayment Program incentives

Reinstatement of SLRP will be in accordance with AR 601-210.

6-8. Termination of Student Loan Repayment Program incentives

Termination will be in accordance with AR 601-210, with the exception of the following:

a. A Soldier participating in the SLRP will be eligible to have repayment apportioned with proper fractional credit for each portion of the year served when the Soldier:

- (1) Enters on AD in an Active Component of a U.S. Armed Force.
- (2) Enters on AD in an AGR status.
- (3) Is transferred or reassigned to the IRR as a direct result of a reduction of over strength, RIF, unit deactivation, or unit relocation.

b. If a Soldier is ordered to AD under 10 USC 12301(d), SLRP eligibility will be terminated if—

- (1) This is the Soldier's initial entry on AD; and
- (2) They are enrolled in the AD entitlement portion of the MGIB (38 USC Chapter 30) per chapter 2. Soldier must make an election to retain SLRP and decline MGIB-AD or decline further SLRP payments and accept MGIB-AD. This is accomplished using DD Form 2366, under item 4, Service Unique Education Assistance Options, a statement will be entered if Soldier elects as follows:

(a) If Soldier elects continuation of SLRP and declines MGIB, Soldier completes item 5 of DD Form 2366 and statement entered in item 4 is "I elect to retain my SLRP from (enter date from Soldier's DA Form 5261-4)."

(b) If Soldier declines SLRP and accepts MGIB, Soldier completes item 3 of DD Form 2366 and statement entered in item 4 is "I understand that I will no longer receive SLRP from (enter date from Soldier's DA Form 5261-4)."

6-9. Recoupment of Student Loan Repayment Program incentives

Recoupment of SLRP incentives will be in accordance with AR 601-210.

6-10. Administrative contacts—correction of errors

a. Correction of contracts and administrative questions should be directed to the applicable agency below for the ARNG and USAR respectively. Since SLRP is also a reenlistment option, AR 601-280 should be consulted. Incentives other than SLRP for USAR Soldiers are described in AR 601-210. ARNG recruiting incentives are listed in NGR 600-7. Instances that cannot be resolved by the applicable agency should be referred to Deputy Chief of Staff, G-1 (DAPE-MPA-CB), 300 Army Pentagon, Washington DC 20310-0300.

b. Correction of administrative errors for ARNG Soldiers and inquiries regarding the SLRP should be directed to their respective SIM. SIMs will forward any issues that cannot be resolved at their level through channels to Chief, National Guard Bureau (ARNG-HRM-I), 111 South George Mason Drive, Arlington, VA 22204-1382.

c. USAR inquiries regarding the SLRP for Soldiers assigned to TPUs should be sent through the chain of command. For IRR, IMA, or AGR Soldiers, send inquiries directly to Commander, USARC (AFRC-CIE). *d.* Separated Soldiers will process actions through the Army Board for Correction of Military Records. Full information is available at <http://arba.army.pentagon.mil/index.cfm>.

Chapter 7

Chaplain Loan Repayment Program - Reserve Component

7-1. General

a. This chapter provides policy and guidance for the administration of the Chaplain Loan Repayment Program (CHLRP). The CHLRP is established in 10 USC 16303 and authorizes the CHLRP for qualified in-service SELRES personnel appointed, or reappointed for a specified term of service in the SELRES. CHLRP provides for repayment of outstanding educational loans. Subject to the provisions of this chapter, the following outstanding loans qualify for repayment as long as they are not in a default status.

(1) Any loan made, insured, or guaranteed under part B of Title IV of the Higher Education Act of 1965 (Federal Stafford Loans, 20 USC 1071);

(2) Any loan made under part D of Title IV of the Higher Education Act of 1965 (William D. Ford Federal Direct Loan Program, 20 USC 1087a);

(3) Any loan made under part E of the Higher Education Act of 1965 (Federal Perkins Loans, 20 USC 1087aa.

(4) Any loan incurred for educational purposes made by a lender that is—

- (a)* An agency or instrumentality of a State;
- (b)* A financial or credit institution (including an insurance company) that is subject to examination and supervision by an agency of the United States or any State;

(c) From a pension fund or a non-profit private entity (subject to case-by-case review and/or approval by HRC (HRC-PDE-EI) for Active Army.

b. Selection of the CHLRP incentive must be accomplished by the applicant when they sign a SELRES contractual agreement as described in the following paragraphs.

- c. The CHLRP may not be combined with other SRIP incentives.
- d. RCs may further limit scope of their SLRP through annually approved SRIP.

7-2. Eligibility

To be eligible for the CHLRP incentive, a Soldier must contractually obligate himself or herself to serve satisfactorily per AR 135-91. Soldier must serve in the SELRES for the full term of the contractual agreement. A Soldier may be eligible for entitlement under the MGIB-SR with continued eligibility to a SRIP incentive. Further, an eligible Soldier is one who:

- a. Contracts to serve in the SELRES of the ARNGUS or USAR as a chaplain as authorized under the SRIP.
- b. Executes a written agreement CHLRP (USAR) or ARNG CHLRP agreement.
- c. In addition to the SRIP general requirements, the following rules and requirements apply:
 - (1) The Soldier must obligate for a 3-year term of service.
 - (2) Soldiers must satisfy all requirements for accession and commissioning of chaplains, as prescribed in regulations.
 - (3) ARNG Soldiers must currently hold and be fully qualified for appointment as a chaplain in the ARNG.
 - (4) Soldiers must have a current endorsement from a religious organization listed as an endorser with the Armed Forces Chaplains Board, DD Form 2088 (Statement of Ecclesiastical Endorsement), which must be uploaded in the incentive management system prior to issuance of a control number.
 - (5) Soldiers must possess outstanding educational loans in accordance with 10 USC 16303. These loans must have been applied toward a basic professional degree or a graduate education resulting in a Master of Divinity degree that qualified the soldier for appointment as a chaplain. All degrees must be obtained from an accredited theological seminary and/or accredited institution of post-secondary education handwork.
 - (6) New loans incurred after signing a 3-year CHLRP incentive agreement will not be eligible until the term is completed and a new 3-year CHLRP incentive agreement is signed.
 - (7) Individuals enrolled in the Chaplain Candidate Program are not eligible to participate in the ARNG CHLRP.
- d. Is appointed, extends their appointment, or is reappointed in the SELRES per AR 140-111, AR 601-210, or NGR 600-200.
- e. Is not contracting to qualify for a permanent military technician position where membership in the SELRES is a condition of employment (includes temporary technician for over 179 days on any one tour and indefinite technician).
- f. Has participated satisfactorily for 1 year in the SELRES. The loan(s) must be at least 1-year old on the Soldier's anniversary date before payment will be made.
- g. Is not entering an AGR status after 2 August 2008.

7-3. Counseling

- a. Commanders will ensure Soldiers contracting for the CHLRP have been counseled by a service representative regarding the Soldier's obligations and responsibilities as cited on the locally reproduced chaplain loan repayment agreement.
- b. Commanders should ensure the Soldier is aware that LRP payments are taxable and it is the Soldier's responsibility to:
 - (1) Make arrangements for deferment or forbearance with lenders or note holders on loans which are falling due; and
 - (2) Initiate the request for loan(s) repayment during each year the Soldier meets the requirements by completing DD Form 2475 and submitting it to the personnel officials of their assigned unit within 90 days of their anniversary date.

7-4. Entitlement

- a. The amount will not exceed \$20,000 for each 3-year period of obligated service or the statutory amount authorized by law.
- b. Qualifying individuals will receive a total of three annual payments during their CHLRP incentive term. Each annual payment will be processed on the anniversary date of their respective service agreement. The law will allow up to a 50 percent payment before completion of the first year of service (10 USC 16303(c)(2)). Current policy states that payments will not exceed one-third of the maximum loan repayment amount.
- c. The maximum amount of the loan(s) is defined by the respective RC as authorized under their annually approved SRIP.
 - (1) USAR and ARNG maximum amounts may differ.
 - (2) Once established, the maximum SLRP incentive available throughout a Soldier's service as an Army RC member (ARNG and USAR combined) cannot be increased unless authorized by Deputy Chief of Staff, G-1 (DAPE-MPA-CB), 300 Army Pentagon, Washington DC 20310-0300.
- d. Loans are verified upon entry into the program.

e. New loans incurred after signing a 3-year CHLRP service agreement will not be eligible for repayment until the term is complete and a new 3-year CHLRP service agreement is initiated.

f. For each year of satisfactory service in the SELRES, the loan amount to be repaid will be \$6,666.66 including interest and related fees.

7-5. Payment processing

a. Each Army component follows a different procedure for processing CLRP payments. Common procedures across all components are:

(1) Once approved for the program, Soldiers will be notified 90 days prior to their anniversary date of contracting for CLRP, and will initiate DD Form 2475 loan repayment application within that 90 day window.

(2) Submission of application will be within 90 days prior to and up to 275 days after the anniversary date, if seeking to pay principal and interest for eligible loans.

(3) A DD Form 2475 received more than 275 days after the CLRP anniversary date will allow payment of principal only for loans originally eligible on that date.

(4) Payments may be claimed for up to 6 years in accordance with the Barring Act, 31 USC 3702. Claims beyond 6 years will be processed through the Army Board for Correction of Military Records. Full information is available at <http://arba.army.pentagon.mil/index.cfm>.

(5) Personnel separated from service requesting CLRP payment see paragraph 6-11d.

(6) Multiple year payments are eligible to be used on the current year DD Form 2475s, provided that Service members' loans are not in default at time of payment.

(7) Payment may not be made on a loan that is in default. Payment may be resumed when the loan returns to good standing but will not be made for the time that the loan was in default.

b. Soldiers may obtain their most current loan information from the National Student Loan Data System (NSLDS) Web site and submit the report in lieu of having the lending agency fill out the DD Form 2475. The NSLDS is the U.S. Department of Education's central database for student aid. It receives data from schools, agencies that guaranty loans, the Direct Loan program, the Pell Grant program, and other U.S. Department of Education programs. NSLDS provides a centralized, integrated view of Title IV loans and Pell grants that are tracked through their entire cycle; from aid approval through closure. In following paragraphs, this will be referred to as the "NSLDS option."

c. Regular Army procedure for processing payments is as follows:

(1) The unit or S1/G1 will complete Part 1 of DD Form 2475 and give the form to the Soldier.

(2) Soldier will complete Parts 2 and 3 of DD Form 2475 and surrender the form to the Soldier's S1/G1 or unit administrator.

(3) The lending agency will complete Part 4 of DD Form 2475 and return the form to the unit or S1/G1 personnel section. If the NSLDS option is used this step can be skipped.

(4) When the DD Form 2475 is received back from the lending agency (or the NSLDS option is used), it will be forwarded to finance for processing.

d. ARNG procedure for processing payments is as follows:

(1) The ARNG unit or S1/G1 will complete Part 1 of DD Form 2475 and give the form to the Soldier.

(2) Soldier will complete Parts 2 and 3 of DD Form 2475 and surrender the form to the Soldier's S1/G1 or unit administrator.

(3) 30 days prior to the date of entitlement, Soldier will provide updated loan information from the Department of Education (DOE) via the National Student Loan Data System (NSLDS).

(4) Applicable documents are uploaded in the Guard Incentives Management System (GIMS).

(5) Designated State Incentives Manager (SIM) will review eligibility and loan information and will complete the payment schedule in GIMS.

(6) Designated National Guard Bureau official will review the eligibility and loan information in GIMS, review the payment schedule and submit the payment request to DFAS.

(7) See ARNG SRIP and corresponding NGB regulations for additional guidance.

e. USAR procedure for processing payment is as follows:

(1) Soldier will log into Web Enabled Benefit Education System by navigating to <https://rcms.usar.army.mil/Education> to access the LRP homepage to initiate the DD Form 2475 for the annual loan repayment application.

(2) Soldier will go to the 'my loan repayment' homepage and the 'manage loans' tab to load lender contact information, promissory notes, and disbursement information. 90 days prior to Soldier's entitlement date each year, the system will unlock for the Soldier to print the DD Form 2475. Note: Only system generated DD Forms 2475 will be processed.

(3) Soldier will print DD Form 2475, sign form, and send directly to the lender. The lender will complete Section 4 and forward to the pay center. Payment processing will take approximately 4 to 6 weeks.

(4) Soldier will continue to check online account and AKO periodically for payment status, updates, and messages from the pay center.

- (5) See USAR SRIP and corresponding USAR regulations for additional guidance.
- f. USAR IMA Soldier procedure for processing payment is as follows:
 - (1) The U.S. Army Reserve Command (USARC) (AFRC-CIE) will complete Part 1 of The DD Form 2475 and give the form to the Soldier.
 - (2) Soldier will complete Parts 2 and 3 and send the form to HRC. USARC (AFRC CIE) will send the form to the appropriate lending agency.
 - (3) The lending agency completes Part r and returns the form to USARC. USARC will send the IMA Soldier's completed form to the appropriate USAR pay center office.
 - (4) IMA Soldiers must provide a copy of the IMA assignment orders.
 - (5) See USAR SRIP and corresponding USAR regulations for additional guidance.

7-6. Longevity of U.S. Army Reserve and Army National Guard Chaplain Loan Repayment Program written agreement.

- a. Once a Soldier has commissioned and executed a written agreement to participate in the CHLRP, the provisions of the written agreement will remain in force until the earlier occurrence of one of the following:
 - (1) Participation in the CHLRP is terminated in accordance with this regulation.
 - (2) The maximum CHLRP benefit as appropriate has been paid.
- b. Continuous service through reappointment does not require the execution of a new CHLRP agreement.

7-7. Termination of Chaplain Loan Repayment Program incentives

Termination will occur when any of the reasons listed below apply.

- a. Enters on AD in an Active Component of a U.S. Armed Force.
- b. Enters on AD in an AGR status and is terminated per this paragraph.
- c. Was transferred or reassigned to the IRR as a direct result of a reduction of over strength, RIF, unit deactivation, or unit relocation.
- d. If a Soldier becomes an unsatisfactory participant per AR 135-91. The termination date entered into the personnel data reporting systems must be the date the Soldier is declared an unsatisfactory participant.
- e. If a Soldier accepts a permanent military technician position where membership in the SELRES is a condition of employment (includes temporary technician for over 179 days on any one tour and indefinite technician).
- f. If a Soldier separates from a SELRES unit of the USAR or ARNGUS for any reason, except contingency operations - AD for operational support and EAD. Separation includes, but is not limited to—
 - (1) Discharge, or transfer to the IRR, ING, Standby, or Retired Reserve.
 - (2) Enlistment or appointment in the Active Army or in an Active Component or RC of another U.S. Armed Force.
 - (3) Has received the maximum benefit authorized.

7-8. Continued receipt of Chaplain Loan Repayment Program incentives

A Soldier may be eligible for continued receipt of CHLRP incentives under the following conditions:

- a. During a period of suspension of favorable personnel actions, receipt of incentives is suspended. When the suspension has been favorably lifted, continued receipt of incentives is authorized.
- b. Voluntary entry or ordered to EAD in the Active Army (accessed to the strength accountability of the active military service of the Army).

7-9. Recoupment of Chaplain Loan Repayment Program incentives

- a. The CHLRP is normally not recouped because time is served prior to receipt of the incentive. However, when overpayment or payment in error is made, recoupment may occur when a waiver of indebtedness is not obtained.
- b. All debts to the Government will be submitted for collection from SELRES members. Delinquent repayment(s) will result in the collection of interest on the remaining balance per 10 USC 2005.
 - (1) The recoupment amount is based on the following formula: basic incentive received multiplied by the basic obligated months not completed divided by total obligated months in a contract (example: 36 months are total obligated months in a 3-year contract).
 - (2) Calculated overpayments to the Soldier will be recouped.
 - (3) Calculated underpayments will be paid in accordance with policy and law.
- c. Commanders are responsible for initiating recoupment procedures whenever a member's eligibility to an incentive is terminated and recoupment is required. The incentives program manager will initiate recoupment procedures when a commander is not in the chain of command over the Soldier or when designated the responsibility of termination and recoupment.
- d. Recoupment of CHLRP payments will not affect that Soldier's period of obligation. A member in the ARNGUS or USAR must serve the balance of the term of service entered into contractually or by statutory requirements.
- e. Commanders will not recoup for any of the following reasons:

(1) When the Soldier's unit is in transition. Termination with recoupment action is required when reassignment in the SELRES is refused by a Soldier who loses their position due to unit transition.

(2) Death, injury, illness, or other impairment not the result of own misconduct.

(3) Enters into an authorized period of nonavailability. The CHLRP would be paid out prorated up to the date the Soldier entered the nonavailable status. ARNG does not prorate payments.

f. When a waiver of indebtedness is obtained for erroneous payments received and the Soldier becomes eligible for the incentive through a reenlistment and/or extension option, the waiver amount will be subtracted from the contracted limit to prevent overpayment of the incentives maximum authorized limit.

7-10. Reinstatement of Chaplain Loan Repayment Program incentives

a. Reinstatement and resumption of subsequent incentive payments following a period of authorized nonavailability is not guaranteed. Soldiers who complete a period of nonavailability and request reinstatement of eligibility for incentives and resumption of subsequent payments must—

(1) Return to active status within the period of authorized nonavailability. The authorized period of nonavailability is 3 years for Soldiers transferred for missionary reasons to the IRR or Standby Reserve per AR 601-210, or transfer to the ING per NGR 614-1; or 1 year for approved transfer to the IRR or ING for cogent personal reasons.

(2) Rejoin an existing vacancy in the SELRES authorized the Soldier's grade and specialty in a bonus authorized unit, or a bonus authorized specialty.

(3) Extend their contract, enlistment, or reenlistment agreement, within 90 days after returning within the period of nonavailability, in order to serve out the full incentive contract period in the SELRES.

b. A Soldier who does not comply with all of the requirements in paragraph 7-10a will be subject to termination of incentives with recoupment action if required.

c. A Soldier who complies with all requirements listed in paragraph 7-10a will be entitled to payments resumed on the adjusted anniversary date of satisfactory creditable SELRES service provided funding is available.

7-11. Administrative contacts-correction of errors

a. Correction of contracts and administrative questions should be directed to the applicable agency below for the ARNG and USAR respectively. Incentives, other than CHLRP for USAR Soldiers, are described in AR 601-210. ARNG recruiting incentives are listed in NGR 600-7. Instances that cannot be resolved by the applicable agency should be referred to Deputy Chief of Staff, G-1 (DAPE-MPA-CB), 300 Army Pentagon, Washington DC 20310-0300.

b. ARNG Soldier inquiries regarding the CHLRP should be directed to their respective State/Territory Incentive Manager. State and/or territory incentive manager's will forward any issues that cannot be resolved at their level through channels to Chief, National Guard Bureau (ARNG-HRM-1), 111 South George Mason Drive, Arlington, VA 22204-1382.

c. Correction of administrative errors will be addressed to Commander, U.S. Army Reserve Command, (AFRC-PRT-R), 4700 Knox Street, Fort Bragg, NC 28310-5010. AR 601-280 and AR 140-111 govern processing for members of a USAR TPU, the SELRES, or for immediate reenlistment and concurrent reassignment to the IRR for USAR members.

d. Separated Soldier will be processed through the Army Board for Correction of Military Records. Full information are available at <http://arba.army.pentagon.mil/index.cfm>.

Chapter 8 Selected Reserve Health Professionals Loan Repayment Program

8-1. General

This chapter provides policy and guidance for the administration of the HPLRP. Under 10 USC 16302, the program is designed to repay designated loans secured by eligible health professions officers serving in Selected Reserve with wartime critical medical skill shortages. Loans that are considered eligible for repayment are loans that were secured for the first qualifying degree that qualified the officer for the AOC which they were commissioned. With the exception of certain Physician Assistant programs, undergraduate and prerequisite courses for admittance into a qualifying degree program, like medical and dental school is not authorized for repayment. Health professional critical specialties will be identified and authorized for the HPLRP in annual HQDA policy guidance.

8-2. Scope

a. The HPLRP will repay outstanding loan(s) that were secured according to 10 USC 16302, to finance health professional education approved by the Secretary of Defense as a critical specialty needed to meet wartime, combat

medical skill shortages. The loan contract must indicate that the loan was incurred for the purpose of education. These loans include the following:

- (1) Stafford Loan Program (formerly Guaranteed Student Loans).
- (2) Federally Insured Student Loans .
- (3) Perkins Loan (formerly National Defense Student Loan and National Direct Student Loans).
- (4) Auxiliary Loans to Assist Students.
- (5) William D. Ford Federal Direct Loan Program.
- (6) Supplemental Loans for Students.
- (7) Consolidated Loan Program.
- (8) Health Education Assistance Loans.

b. Repayment of loans is made on the basis of each year of satisfactory service performed by a health professional as a qualified commissioned officer in the SELRES.

(1) Healthcare professionals who entered into a previous HPLRP agreement (whether complete or not) may reenter into a new agreement to have the HPLRP pay on an annual basis the amount authorized in that component's current SRIP policy, up to the statutory lifetime cap listed in the current AMEDD incentives policy for their specialty in their component, if their specialty is listed on the current Critical Wartime Shortage List.

(2) HPLR is considered additional income, therefore, taxes will be withheld from all payments.

c. The healthcare professional must understand that they will only receive the difference between the new program cap and what he or she has already received. Loans in default do not qualify for repayment under this program. Loans less than 1 year of age are not eligible for repayment until they become 1-year old; these loans will be eligible for repayment on the next anniversary date. Disbursement will not exceed indebtedness. Interest and fees are not authorized for repayment.

8-3. Eligibility

For each year of satisfactory service as a SELRES member, the Government will repay designated loans for an officer that (see para 8-2)—

- a.* Is participating satisfactorily as a SELRES member.
- b.* Initiates DA Form 5536 (Agreement Health Professionals Loan Repayment (HPLR)).
- c.* Remains in good professional standing as a SELRES member and has a valid license or physician assistant certification (or has completed at least 2 years of residency) in an authorized critical healthcare professional specialty.
- d.* Is a commissioned officer qualified, performing, or training in one of the authorized health professional specialties approved annually by HQDA at the time of application.
- e.* Is not contracting to qualify for a permanent military technician or AGR position where membership is a condition of employment (temporary assignment as a military technician for 6 months or less are excluded).

8-4. Application to participate

a. To apply for participation in the HPLRP, the eligible officer must have qualifying loans at the time of signing the DA Form 5536. SELRES unit members will process through their unit commander or health care recruiting team (AMEDD recruiter/Officer Strength Manager (OSM) and IMA members will process through their PMO.

b. The agreement should be executed on SELRES assignment or thereafter on meeting all eligibility criteria.

c. The anniversary date for the repayment of loan(s) is based on the date the officer completes the agreement. Each year of satisfactory SELRES service performed under the terms of the agreement will qualify the Servicemember for repayment of eligible loan(s).

d. The unit commander, Health Care Recruiting Team and/or AMEDD recruiter and/or OSM, or PMO will assist in completing the agreement and distribution will be administered in the following manner:

(1) The original copy for—

(*a*) ARNG officers - Will be incorporated as part of the accession packet. A copy will be filed in the officer's iPERMS file.

(*b*) USAR officers -Will be sent to Commander, U.S. Army Human Resources Command (HRC-OPH-PAI), Incentives Branch, 1600 Spearhead Division Avenue (Department 270), Fort Knox, KY 40122-5401, for insertion in the officer's iPERMS file.

(2) A copy will be provided to the officer.

8-5. Entitlement

a. On each anniversary date, any authorized loan(s) will be considered eligible for repayment that—

(1) Has an outstanding balance on the principal.

(2) Has been secured for at least 1 year prior to the current anniversary date.

b. The designated amount of repayment to be made on the anniversary date of those agreements are established as follows:

(1) The maximum gross aggregate per year the amount authorized in the annual SRIP guidance for that component, or the remaining balance of the loan(s), whichever is less.

(2) Total program repayment for all years will not exceed the statutory lifetime cap listed in the AMEDD incentives policy at the time the contract is signed.

c. The designated amount of repayment to be made on the anniversary date of eligible loan(s) is established as follows: The maximum aggregate per year is the amount authorized in the annual SRIP guidance for that component or the remaining balance of the loan(s), whichever is less.

d. The following repayment restrictions apply:

(1) The repayment cannot exceed the outstanding balance.

(2) The agreement, DA Form 5536, does not change the officer's obligation to the lender or holder of the note(s).

(3) Refunds of payments on previous loans made by the Servicemember will not be reimbursed.

8-6. Administration

a. The officer will furnish the unit copies of each promissory note 90 days prior to their anniversary date. They will also coordinate with the unit to process the necessary documentation to confirm loan repayment status and initiate repayment procedures. Exception to this rule is not authorized.

b. Application for repayment will be made on DD Form 2475, DoD Educational Loan Repayment Program (LRP) Annual Application, January 2014 with instruction sheet. The officer will obtain the DD 2475s from the SIM or their incentives representative.

(1) The designated personnel office will complete Section 1. The Servicemember will complete Section 2. The loan servicing agency will complete Section 3.

(2) Upon completion of the sections by the loan servicing agency the agency is to return the form to the following locations:

(a) USAR: U.S. Army Reserve Pay Center (ARRC-COO-R), (SLRP/HPLR), 1913 South B Street, Fort McCoy, WI 54656-5122; FAX: 608-388-8238; email: usarmy.usarc.usarc-hq.mbx.recpsotmslrpscan@mail.mil.

(b) ARNG:

1. State Incentives Manager, or

2. State AMEDD Recruiter or OSM.

8-7. Voluntary Active Army assignment

An officer who voluntarily enters on AD, is assigned to the Active Army, and is placed on the AD list terminates their eligibility for the HPLRP. The officer may be eligible for a partial year repayment based on the number of whole months satisfactorily served in the SELRES prior to entering the Active Army.

8-8. Specialized Training Assistance Program participants receiving health professionals loan repayment

Specialized Training Assistance Program (STRAP) participants may enroll in the HPLRP under the following conditions:

a. Must meet the eligibility criteria outlined in paragraph 8-3.

b. Must not be serving a contractual obligation for an incentive received under another program or serving another obligation by some other section of law.

c. Physicians and dentists must have completed 2 years of residency training, and be participating as a SELRES member on or after 17 October 1998.

d. New STRAP participants may start HPLR at any time during the stipend phase. In both scenarios, the STRAP obligation dates will be readjusted for service after the HPLRP obligation is completed or current loan(s) are paid in full.

e. Participants entering on or after 17 October 1998 who were never eligible for, or never received, the HPLR may be eligible for the HPLRP in the amount listed in the current AMEDD incentives policy for their specialty. Physicians and dentists must have completed 2 years of residency training, and be participating as a SELRES member on or after 17 October 1998. Dentists and/or dental students in the ARNG are not authorized to take HPLRP during a residence program.

f. All health professionals must agree to extend their STRAP obligation start and completion dates when the STRAP stipend phase is completed prior to the completion of the HPLR. The STRAP manager must compute all STRAP obligor extensions. A copy of the HPLRP agreement and STRAP addendum DA Form 5685 (New Specialized Training Assistance Program (New STRAP) Service Agreement) must be sent to:

(1) Commander, U.S. Army Human Resources Command, (HRC-OPH-PAI) Incentives Branch, 1600 Spearhead Division Avenue (Department 270), Fort Knox, KY 40122-5401.

(2) Chief, National Guard Bureau (ARNG-GSE-I), 111 South George Mason Drive, Arlington, VA 22204-1382. For example: An officer completes their STRAP training on 30 June 2001; however, their HPLRP anniversary date is

not until 12 October 2001. In order to receive their HPLRP anniversary payment, the officer must agree to extend their STRAP obligation 3 months and 12 days. The STRAP extension for ARNG officers will be completed in the Guard Incentive Management System.

g. STRAP participants who use their HPLRP incentives prior to completion of their specialized training are not required to have their service obligation extended.

h. At the time of application for the HPLRP, the Soldier's health professional specialty must be one of the authorized wartime specialties identified as critically short.

i. The officer cannot continue receipt of the HPLR and serve their STRAP obligation at the same time. In order for the officer to continue receipt of the HPLR, they must agree to extend their STRAP obligation for the length of time they continue receipt of the HPLR.

j. The USAR pay center must be notified by HRC when the HPLRP benefits are suspended or terminated. In order for the officer to begin serving his or her STRAP obligation he or she cannot serve simultaneous service to qualify for HPLRP.

Chapter 9

Health Professional Stipend Programs

9-1. General

This chapter provides policy and guidance for the administration of the Health Professional Stipend Programs, Medical and Dental Student Stipend Program (MDSSP), and STRAP. Under 10 USC 16201, the programs are designed to provide financial assistance to commissioned Medical/Dental students (Military Science/Medical Corps and Military Science/Dental Corps), and Army Nurse Corps (AN) officers in the RCs engaged in training in a health professional specialty. Health professional critical specialties will be identified and authorized for STRAP in annual HQDA policy guidance.

9-2. Scope

a. The stipend provides financial assistance to officers engaged in specialized training in return for their service in the SELRES. A commissioned officer in the Ready Reserves, who is engaged in a program of professional training for medical and/or dental students, physicians, or registered nurses in critical specialties designated by the HQDA, is entitled to a monthly stipend of the amount which is authorized in the annual SRIP guidance for that component and shall not exceed that which is authorized in 10 USC section 2121. This rate is subject to annual increases on 1 July of each year as determined by the Secretary of Defense. The officer incurs a 1-year obligation for each 6-month period (or part thereof) that they receive the stipend. The obligation must be fulfilled directly following the program completion.

b. The Health Professional Stipend Program is a two-phase program. During the stipend phase, a participant receives bi-monthly payments. During the obligor phase, a participant pays back the obligation incurred. The participant must serve their obligation upon successful completion of the program. The two types of stipend programs are:

(1) MDSSP provides a monthly stipend to individuals accepted into an accredited medical, osteopathic, or dental program. There are two phases of the MDSSP.

(a) During the stipend phase (duration of medical or dental school), participants will be assigned the primary area of concentration of 00E67 and branched into the MS. MDSSP may be taken for any number of years during medical and/or dental school. However, if the applicant only desires to take MDSSP for a portion of the remaining school period, the start date must be calculated back from the school end date.

(b) During the obligor phase (fulfillment of contractual obligation), participants must be assigned to either a TPU or IMA position. The obligation will be satisfied immediately following residency completion unless the individual elects to enter into the STRAP program for residency.

(2) STRAP provides a monthly stipend to physicians and registered nurses working towards their Family Nurse Practitioner in critical specialties (DC is not authorized to participate in STRAP).

(a) Physicians may take STRAP for any number of years during residency. However, if the applicant only desires to take STRAP for a portion of the remaining residency period, the start date must be calculated back from the residency program end date.

(b) Registered nurses who are enrolled or have been accepted for enrollment in an accredited masters nursing program in a specialty designated by the SECARMY as a specialty critically needed, in accordance with the component that the Servicemember is affiliated, may apply for STRAP.

(c) STRAP for Master of Science in Nursing (MSN) program may be given for a maximum of 2 years. The STRAP start date must be calculated from the date that is less than or equal to 2 years from the participant's anticipated graduation from his or her Bachelor of Science in Nursing Degree Program. The BSN degree program must be completed within 24 months of signing the STRAP agreement and prior to the convening date of their first consideration for the mandatory selection board to the rank of captain. The STRAP participant must earn at least 50 percent of

the credit hours required for full-time student status at their education institution and maintain a grade point average of at least 2.0 on a scale of 1.0 to 4.0, and/or obtain a letter grade of 'C' in all their courses. Must be approved for the stipend through the USAREC Board.

(d) STRAP for MSN program may be offered to AN officers pursuing master's degree programs. The STRAP participant must earn at least 50 percent of the credit hours required for full-time student status at their education institution. The program must be acceptable to DA and accredited by an agency recognized by the U.S. Secretary of Education. Nurse anesthesia programs must be fully accredited by the Council on Accreditation of Nurse Anesthesia Educational Programs, American Association of Nurse Anesthetists (not authorized for ARNG officers).

c. The program is managed by the STRAP managers at HRC and ARNG. The health professional stipend participant must notify the appropriate STRAP manager, through the appropriate ARNG or USAR command or PMO, of any changes in status that may affect eligibility to continue to receive the stipend.

(1) USAR: Commander, U.S. Army Human Resources Command (HRC-OPH-PAI) Incentives Branch, 1600 Spearhead Division Avenue (Department 270), Fort Knox, KY 40122-5401.

(2) ARNG: Chief, National Guard Bureau (ARNG- HRM-I) (AMEDD Incentives), 111 South George Drive, Arlington, VA 22204-1382.

9-3. Eligibility

To be eligible for this program, participants must meet all of the following requirements. The officer must—

- a. Be a commissioned officer in the Ready Reserve, but not serving in an AGR or Military Technician status.
- b. Be designated or assigned for service in the MC, AN or in a student status (00E67), MS/MC or MS/DC.
- c. Medical or dental students (00E67) must be enrolled or accepted to an institution in a course of study that results in a degree in medicine or dentistry.
- d. Physicians must be enrolled or accepted for enrollment in a residency program in a medical specialty designated by the SECARMY.
- e. Registered nurses who are enrolled or have been accepted for enrollment in an accredited masters nursing program in a specialty designated by the SECARMY as a specialty critically needed.
- f. The participant will not be eligible to receive the stipend before being appointed as a Reserve officer for service in the Ready Reserve, before the program start date, or before the contract is signed.
- g. Remain assigned to the Ready Reserve while participating in the Health Professional Stipend Program.
- h. Be able to fulfill the incurred service obligation prior to the officer's mandatory removal based on age and/ or length of service
- i. Not be receiving financial assistance under an ROTC or Health Professions Scholarship Program.
- j. Must be approved for the stipend through the USAREC Board.

9-4. Application and enrollment procedures

a. Civilian applicants seeking concurrent appointment in the ARNG or USAR (MC, AN, MS/MC, or MS/DC) will contact their area ARNG AMEDD recruiter or USAR AMEDD recruiter, respectively, to initiate an application. Selection for the Health Professional Stipend Program participation is conducted simultaneously with selection for appointment.

b. Current eligible AMEDD officers may also apply for the Health Professional Stipend Program and will be subject to the same boarding process. The officer will follow instructions below:

(1) USAR commissioned officers will contact appropriate unit personnel or career management officer (CMO) to initiate a STRAP only packet (for all Health Professional Stipend Programs). The local USAR AMEDD recruiter may assist the applicant, unit, and CMO with preparation and submission of the STRAP only packet. USAR STRAP only packets will be forwarded to Commander, USAREC.

(2) ARNG officers will contact their State AMEDD recruiters to initiate a STRAP only packet (for all Health Professional Stipend Programs). The AMEDD recruiter and unit may assist the applicant with preparation and submission of the STRAP only packet. ARNG STRAP only packets will be forwarded ARNG, NGB-GSS.

(3) If a MC or DC officer has previously been boarded and approved by USAREC for participation in MDSSP then they are not required to re-board for STRAP. (Exception: ARNG officers transferring to the USAR with the STRAP option will be required to board for STRAP. See instructions in paragraph 9-4b(1)).

c. The completed appointment packets and STRAP only packets of all fully qualified officers will be reviewed by the USAREC selection board under the authority of HQDA.

d. Following the board deliberation, the board secretariat will compile recommended selected and the not selected lists of the current applicants.

e. On receipt of the approved board results, notification will be sent to all applicants. Applicants who were not selected will also be notified that they may reapply 1 year from the date the selection board results are approved.

f. If the applicant is selected to participate in the Health Professional Stipend Program, he or she will need to

complete an enrollment packet. The applicant must complete the enrollment packet with the assistance of his or her AMEDD recruiter, CMO, or unit. The applicant must have their signature witnessed.

g. The enrollment packet, when completed, must be sent to the STRAP manager who will sign the service agreement on behalf of TSG (see para 9–2c).

9–5. Participant responsibilities to maintain eligibility

a. To maintain Health Professional Stipend Program eligibility and continue to receive financial assistance the officer must:

(1) Comply with all academic, medical, administrative, and other standards and requirements outlined for the specialized training program. This includes compliance with applicable directives and instructions issued by DCS, G–1; CNGB; CAR; or other competent authority.

(2) Advise the STRAP manager, through the appropriate ARNG or USAR command or PMO, of any changes in status that may affect eligibility to continue to receive the stipend. This includes the following:

(a) Training program status.

(b) Academic standing.

(c) Health.

(d) Personal information such as marital status, address, and telephone number.

b. Participants are responsible for semiannual verification of program enrollment. The academic institution must forward the verification directly to the ARNG or USAR STRAP manager. Verification of attendance at the educational institution needs only to be made twice a year for institutions that conduct more than two semesters.

(1) USAR participants will complete the STRAP enrollment verification.

(2) ARNG participants will use the NGB Form 810 (Specialized Training Assistance Program Enrollment Verification) for enrollment verification. The NGB 810 will be uploaded into the Guard Incentive Management System between 1 June–15 July and 1 December to 15 January. There must be a visible school seal in the lower left hand corner; if the school does not have an official seal, a memorandum on the schools letterhead is required in addition to the NGB 810.

c. Payment of a stipend will be withheld pending an officer's compliance with paragraphs 9–5a and 9–5b when the officer's eligibility or status cannot be immediately determined.

9–6. Suspension of participation

a. Payment of a stipend is not authorized during a period of suspension.

b. The STRAP manager, on behalf of TSG, may suspend an officer's entitlement to a stipend and active participation in the Health Professional Stipend Program may be suspended, in lieu of termination, for a specified period of time not to exceed 1 year. Suspension from the program must be in writing. The reasons are generally associated with eligibility issues and include, but are not limited to, major changes in life which preclude further pursuit of education during a period of time in which a student has contracted illness, divorce, death of Family member or extended Family member who may provide child care or other educational support. Participant will be suspended from the program if the officer is—

(1) Transferred from the Ready Reserve to the Standby Reserve. If the officer is transferred for a temporary hardship the period of suspension may not exceed 1 year.

(2) Placed under suspension of favorable personnel actions under the provisions of AR 600–8–2. During a suspension for this reason, the officer may continue to be required to participate satisfactorily in the SELRES (if so assigned). Maximum authorized period of such suspension is 1 year.

(3) Requests for suspension will be made to the STRAP manager in writing with justification.

c. STRAP MS participants will be suspended if they are transferred from the Ready Reserve to the Standby Reserve as a result of overseas residency or missionary obligation. The period of suspension may not exceed 3 years.

d. MDSSP participants may be suspended for the following reasons (in addition to the ones listed above):

(1) If they are required to repeat a subject, provided they have not been suspended from their own educational program, and will be permitted to continue the completion of their degree.

(2) When changes to the program of origin extend the student beyond the maximum time stated in the MDSSP agreement.

9–7. Reinstatement after a period of suspension

a. An officer who completes a period of suspension may request reinstatement of Health Professional Stipend Program participation and resumption of stipend payments. Requests for reinstatement will only be considered if the officer is otherwise eligible. The request should be sent through the appropriate ARNG or USAR command to the STRAP manager at least 45 days prior to the end of the authorized suspension period.

b. Reinstatement in the Health Professional Stipend Program and resumption of stipend payments is made at the discretion of the STRAP manager, on behalf of TSG, and cannot be guaranteed.

c. If the suspended participant is not eligible for reinstatement, the participant will continue in a suspended status until completion of the program for which he or she was originally contracted.

9–8. Termination

a. Early termination of an officer's participation in the Health Professional Stipend Program must be directed or approved by the STRAP manager acting on behalf of TSG. Such early termination may only be for one or more of the following reasons:

(1) Participation in the Health Professional Stipend Program may be terminated if an officer—

(a) Fails to complete a specialized training program or educational program and either is released from the program or voluntarily stops training in the specialty designated in the participant's stipend agreement.

(b) Fails to meet or maintain the eligibility requirement for the Health Professional Stipend Program. These requirements include, but are not limited to the following:

1. Membership in good standing in the Ready Reserve.

2. Valid licensure, as required.

3. Attendance in good standing at the specialized course of training or educational program.

(c) Is convicted of any of the following:

(1) A felony as defined under Federal, State, or local law.

(2) An offense which, if tried under the Uniform Code of Military Justice, could result in a sentence of at least 1 year of confinement or a dishonorable discharge.

(d) Commits one or more acts resulting in discreditable involvement with civilian or military authorities (for example, public drunkenness). An officer may be terminated from the program whether or not the officer is charged, indicted, tried, or convicted of such acts.

(e) Becomes an unsatisfactory participant under the provisions of AR 135–91.

(f) Exceeds the maximum period authorized for suspension in paragraph 8–6.

(g) Applies for conscientious objector (1–0) status.

b. Additionally, participation may be terminated by the STRAP manager acting on behalf of TSG, if such an action is in the best interest of the Government.

c. Participants terminated will serve their statutory and contractual obligations in the Military Medical Corps and in an area of concentration that best meets the needs of the ARNG or USAR.

9–9. Medical and Dental Student Stipend Program to Specialized Training Assistance Program

a. In the case of an MDSSP participant who enters into a subsequent agreement under the STRAP to complete a training program designated by the Secretary of Defense as a specialty critically needed by the Army in wartime and who—

(1) Does not elect to contract for the HPLRP during his or her training program, the obligation incurred under MDSSP begins immediately upon ending the MDSSP stipend phase. The obligation phase of the MDSSP is reduced by 1 year for each year, or part thereof, for the amount of time for which the STRAP stipend was provided while completing their specialty training program. This in no way changes the obligation incurred under the STRAP agreement. In the event that the specialty training program is shorter in duration than the recalculated obligation incurred by MDSSP, the obligation incurred by the STRAP contract will start upon completion of the obligation incurred by the MDSSP contract.

(2) Elects to contract for HPLRP during their training program, the obligation incurred under MDSSP begins immediately upon completion of the HPLRP obligation. The obligation phase of the MDSSP is reduced by 1 year for each year, or part thereof, for the amount of time for which the STRAP stipend was provided while completing his or her specialty training program. This in no way changes the obligation incurred under the STRAP agreement. In the event that the training program is shorter in duration than the obligation incurred by MDSSP, the obligation incurred by the STRAP contract will start upon completion of the obligation incurred by the MDSSP contract.

b. In the case of an MDSSP participant who enters into a training program (residency and/or fellowship) not designated by the Secretary of Defense as a specialty critically needed by the Army in wartime or who enters into a training program that is critically short but declines to contract for STRAP, the obligation incurred under the MDSSP agreement begins upon completion of the residency and/or fellowship.

Chapter 10

Post-Vietnam Era Veterans Educational Assistance Program

10–1. Authority

a. PL 94–502 established the Post-Vietnam Era Veterans' Educational Assistance Program (VEAP), which is codified in 38 USC Chapter 32.

b. VEAP was designed to—

- (1) Provide educational assistance to individuals who entered the Armed Forces after 31 December 1976.
- (2) Assist individuals in obtaining an education they might not otherwise afford.
- (3) Attract quality men and women to serve in the Armed Forces.

c. VEAP is a voluntary contribution-matching program for Soldiers who initially entered AD after 31 December 1976 and before 1 July 1985. Except as otherwise specified in paragraph 9–5b, each Soldier who entered AD during that period had the right to enroll in VEAP any time before 1 July 1985.

10–2. Eligibility

a. A Soldier is eligible if he or she—

- (1) Entered AD after 31 December 1976 and before 1 July 1985.
- (2) Was ineligible for the Vietnam-Era GI Bill.
- (3) Served for a continuous period of more than 180 days unless released or discharged because of a service-connected disability.
- (4) Separated from AD under conditions other than dishonorable.
- (5) Contributed money to VEAP while on AD.
- (6) Completed 24 continuous months of AD if originally enlisted after 7 September 1980. This requirement does not apply if the Veteran—

(a) Separated from AD under an early release of 3 months or less, hardship discharge, or for disability incurred or aggravated in the line of duty.

(b) Has a service-connected disability.

(c) Entered on AD after 16 October 1981, and had previously completed a continuous period of at least 24 months AD, or separated from such a period under an early release separation of 3 months or less.

b. Soldiers can use VEAP benefits while on AD if they have—

- (1) Entered AD after 31 December 1976 and before 1 July 1985.
- (2) Not been eligible for the Vietnam Era GI Bill.
- (3) Served for a continuous period of more than 180 days unless released or discharged because of a service-connected disability.
- (4) Completed either—

(a) *Enlisted Soldiers*. First obligated period of AD, that is, the number of years initially obligated for on the DD Form 4.

(b) *Commissioned officers*. Initial obligated period of AD. The USMA graduate must complete 5 years to qualify for in-service use of benefits. Officers receiving their commissions from ROTC have a 3- or 4-year obligated period of AD, and the OCS officer has a 3-year period of AD before in-service benefits can be used.

(c) *Warrant officers*. Most WOs have completed an enlistment. However, in those cases when the WO came into the service from civilian life through the WO Candidate School, the S–1 can advise the counselor regarding the initial obligated term of service. For instance, the flight program during VEAP carried an obligation of 48 months of AD following the completion of training.

(5) Contributed money to VEAP and made at least 3 months of contributions or equivalent through a lump sum payment and have an active enrollment going into the Education Savings Allotment using DD Form 2558.

10–3. Duration of eligibility (delimiting date)

Eligibility of benefits extends 10 years from date of last discharge or REFRAD.

10–4. Extension of eligibility

a. Veterans and Soldiers may receive an extension of the eligibility period if a physical or mental disability prevented them from initiating or completing their chosen program of education. The disability cannot be a result of their willful misconduct.

b. Extensions may be granted for the length of time that the disability prevented them from initiating or completing a program. Applicants may apply to the nearest VARO for extensions.

10–5. Enrollment necessary to establish eligibility

Soldiers must have enrolled during 1 January 1977 through 30 June 1985 or were eligible to enroll on 30 June 1985 and enrolled during the special enrollment period 28 October 1986 through 31 March 1987. After 31 March 1987, a VEAP account could not be opened.

10–6. Participation and entitlements

a. Participation in VEAP is done by—

(1) *Monthly contributions.* When monthly contributions are to be made to their VEAP account, the following provisions apply:

(a) Soldiers participating in VEAP may authorize a monthly deduction from their pay.

(b) The monthly deduction may be no less than \$25 and no more than \$100. The amount of the deduction must be divisible by 5.

(2) *Lump sum.* The following lump sum provisions apply:

(a) Payments may be credited for past and present months only.

(b) Additional payments may be credited to any month in which a contribution by allotment was made. The combined total for any 1 month may not exceed \$100.

(c) Payments may be used to re-credit months for which the Soldier has received a refund.

(3) *Monthly and lump sum contributions.* A combination of monthly and lump sum contributions are authorized up to a maximum of \$100 per month. Total contributions by a Soldier (monthly or lump sum) will not exceed \$2,400 for a 2-year term of service and \$2,700 for a 3-year or more-year term of service.

b. Each dollar contributed by a Soldier will be matched by \$2 contributed by the Army.

c. The maximum total entitlements are as follows:

(1) \$7,200 for a 2-year obligation; or

(2) \$8,100 for an obligation of 3 or more years.

(3) Plus any accrued Kicker benefits.

d. Benefits are as follows:

(1) A participant is entitled to a maximum number of monthly benefit payments or the equivalent in part-time training. A participant is entitled to either the number of months of contributions to a VEAP account or 36 months (whichever is less).

(2) The monthly dollar amount for full-time training will be determined by dividing total entitlements by the number of months contributed to VEAP or 36 months, whichever is less.

(3) Payments to eligible Soldiers who are drawing benefits and continuing to contribute to the VEAP fund will initially be based on the amount of entitlements available at the time the first benefit check is computed.

10-7. Suspension of Soldier's contributions

Soldiers may suspend contributions to their VEAP account without penalty. Suspension does not result in a refund to the Soldier. The following provisions apply:

a. Soldiers may suspend contribution for any reason after at least 12 consecutive months of contributions.

b. Soldiers submit a DD Form 2558 to DFAS to suspend contributions to VEAP.

c. Suspended accounts may be reopened by starting an allotment at DFAS or through use of a lump sum payment by using DD Form 1131.

10-8. Disenrollment and refunds

a. Soldiers may disenroll from VEAP by stopping the educational savings allotment and withdrawing their contributions from their account. Those who disenroll forfeit all accrued entitlements except a refund of their contributions. VA Form 22-5281 will be used to disenroll from VEAP. Disenrollment follows the same provisions as those used with suspension of contributions. Soldiers must complete VA Form 22-5281 and forward to DFAS for certification of allotment stop. DFAS will forward VA Form 22-5281 to the nearest VARO. Veterans should complete the refund application and forward directly to the nearest VA office. Soldiers who have disenrolled may reenroll at any time while on AD or during subsequent enlistments or re-enlistments.

b. Soldiers and Veterans who disenroll and withdraw their contributions lose eligibility for VEAP and corresponding ACF, if eligible. ACF-eligible AD Soldiers enrolled in VEAP during their initial enlistment who subsequently withdraw their VEAP contribution may reinstate their ACF eligibility if they reenroll in VEAP through the lump sum method before they leave AD. Soldiers must ensure that their first enlistment is credited with the lump sum payment. A statement reflecting credit to the initial enlistment must appear in the Remarks section of the DD Form 1131. Resumption of monthly allotments using DD Form 2558 will not automatically credit the new deposit to an initial enlistment. Note: Veterans who disenroll from VEAP, unlike AD Soldiers, cannot reinstate their eligibility.

c. DVA, not the Army, is responsible for refunding a Soldier's personal VEAP contributions. Questions regarding refunds must be directed to the nearest VARO.

d. VEAP disenrollment results in loss of educational benefits. Therefore, it is imperative that the local AEC counsels Soldiers before completing VA Form 22-5281.

10-9. Authorized training

a. Traditional institutional course work.

b. Apprenticeship.

c. On-the-job training.

- d. Correspondence course work.
- e. Vocational flight training; no new enrollments permitted after 30 September 1981.

10–10. Application procedures

- a. Applicants must apply to the DVA for benefits using VA Form 22–1990.
- b. Applicants applying for assistance—
 - (1) *In the United States.* Send application to VARO in the State where the educational institution is located.
 - (2) *Outside the United States.* Send application to:
 - (a) For Atlantic localities: Department of Veterans Affairs Regional Office, PO Box 1303, Buffalo, NY 14240–4616.
 - (b) For Pacific localities: Department of Veterans Affairs Regional Office, PO Box 8888, Muskogee, OK 74402–8888.
 - (3) *Outside the United States and attending American schools at overseas installations.* Submit applications through the school. VARO nearest the stateside campus will process.

Appendix A References

Section I Required Publications

AR 600–8–2

Suspension of Favorable Personnel Actions (Flags) (Cited in para 9–6.)

AR 600–8–101

Personnel Processing (In Out-, Soldier Readiness, Mobilization, and Deployment Processing) (Cited in para D–10.)

AR 601–210

Active and Reserve Components Enlistment Program (Cited in para 2–7a(1).)

AR 621–5

Army Continuing Education System (Cited in para 1–4b(2)(g).)

AR 635–200

Active Duty Enlisted Administrative Separations (Cited in para 2–3e(2).)

Section II Related Publications

A related publication is a source of additional information. The user does not have to read it to understand this regulation. DOD publications are available at <http://www.dtic.mil/whs/directives/>. PLs and USCs are available at <http://www.gpo.gov/fdsys/search/home.action>.

Accredited Institutions of Post–Secondary Education Handbook

(Available at: <http://ope.ed.gov/accreditation/>.)

AR 11–2

Managers' Internal Control Program

AR 25–30

The Army Publishing Program

AR 135–7

Army National Guard and Army Reserve Incentive Programs

AR 135–18

The Active Guard Reserve (AGR) Program

AR 135–91

Service Obligations, Methods of Fulfillment, Participation Requirements, and Enforcement Procedures

AR 135–178

Enlisted Administrative Separations

AR 135–210

Order to Active Duty as Individuals for Other than a Presidential Selected Reserve Call-up, Partial or Full Mobilization

AR 140–10

Assignments, Attachments, Details, and Transfers

AR 140–111

U.S. Army Reserve Reenlistment Program

AR 601–280

Retention Program

AR 611-1

Military Occupational Classification Structure Development and Implementation

AR 635-5-1

Separation Program Designator (SPD) Codes

Association of Theological Schools Handbook of Accreditation

(Available at: <http://www.ats.edu/uploads/accrediting/documents/handbook-section-1.pdf>.)

DODD 1322.16

Montgomery GI Bill (MGIB) Program

DODD 1322.17

Montgomery GI Bill-Selected Reserve (MGIB-SR)

DODI 1341.13

Post-9/11 GI Bill

Higher Education Act of 1965, as amended and reauthorized

Codified in Title 20, U.S. Code

NGB-ARH Policy Memorandum 09-026

Interim Policy for Extension, Immediate Reenlistment, and Bar to Reenlistment/Immediate Reenlistment/Extension

NGR 600-7

Selected Reserve Incentive Programs

NGR 600-200

Enlisted Personnel Management (Available at: <http://www.ngbpdc.ngb.army.mil/pubs/ARNG%20Series/arnghseries.htm>.)

NGR 614-1

Inactive National Guard

10 USC Chapter 1606

Educational Assistance Program for Members of the Selected Reserve

10 USC Chapter 1607

Educational Assistance for Reserve Component Members Supporting Contingency Operations and Certain Other Operations

10 USC 12301

Reserve components generally

10 USC 16131

Educational assistance program; establishment; amount

10 USC 16303

Loan repayment program: chaplains serving in the Selected Reserve

31 USC 3702

Authority to settle claims

PL 94-502

Veteran's Education and Employment Assistance Act of 1976

PL 96-342

Section 903, Educational Assistance Pilot Program

PL 100–689

Veterans' Benefits and Programs Improvement Act of 1988

PL 98–525

Department of Defense Authorization Act for 1985

PL 101–510

National Defense Authorization Act for Fiscal Year for Fiscal Year 1991

PL 102–484

Section 4404, Opportunity for Certain Persons to Enroll in All-volunteer Force Educational Assistance Program

PL 102–568

Veteran's Benefits Act of 1992

PL 103–160

National Defense Authorization Act for Fiscal Year 1994

PL 104–201

National Defense Authorization Act for Fiscal Year 1997

PL 104–275

Veterans Benefits Improvements Act of 1996

PL 106–398

Floyd E. Spence National Defense Authorization Act for Fiscal Year 2001

PL 106–419

Veterans Benefits and Health Care Improvement Act of 2000

PL 107–14

Section 7(c), Veterans' Survivor Benefits Improvement Act of 2001 for Tuition Assistance "Top-Up".

PL 107–103

Veterans Education and Benefits Expansion Act of 2001

PL 107–107

National Defense Authorization Act For Fiscal Year 2002

PL 108–375

National Defense Authorization Act for Fiscal Year 2005

PL 110–181

National Defense Authorization Act for Fiscal Year 2008

PL 110–252

Supplemental Appropriations Act, 2008

Transfer of Education Benefits (TEB) Application User Manual

(Available at <https://www.dmdc.osd.mil/milconnect/help/pdf/teb-help.pdf>.)

5 USC

Government Organization and Employees

10 USC 101(d) (6) (a)

General Military Law- Definitions

10 USC Chapter 107

Professional Military Education

10 USC 1142

Preseparation Counseling; transmittal of medical records to the Veteran's Administration

10 USC 2005

Advanced Education Assistance; active duty agreement; reimbursement requirements

10 USC 2107

Financial assistance programs for specially selected members

10 USC 2107a

Financial Assistance for specially selected members: Army Reserves and Army National Guard

10 USC 2171

Education Student Loan Repayment Program: enlisted members on active duty in specified military specialties

10 USC 10143

Ready Reserve: Selected Reserve

10 USC 10147

Ready Reserve: training requirements

10 USC 12304

Selected Reserve and certain Individual Ready Reserve members; order to active duty other than during war or national emergency

10 USC 12732

Entitlement to Retired Pay: Computation of years of service

10 USC 16131

Educational assistance program: establishment; amount

10 USC 16162

Educational assistance program

10 USC 16201

Financial Assistance: healthcare professionals in the reserve components

10 USC 16301

Education loan repayment program; members of the Selected Reserve

10 USC 16302

Education loan repayment program; health professional officers serving in the Selected Reserve with wartime critical medical skill shortages

10 USC 16303

Loan Repayment Program; Chaplains Serving in the Selected Reserve

20 USC 1071

Statement of purpose;- nondiscrimination; and appropriations authorized

20 USC Part C

William D. Ford Direct Loan program

31 USC 3702

Authority to Settle Claims

38 USC Chapter 30

All Volunteer Force Educational Assistance Program

38 USC Chapter 32

Post-Vietnam Era Veterans Educational Assistance

38 USC Chapter 33

Post 9/11 Educational Assistance

38 USC Chapter 34

Veterans Educational Assistance

42 USC Chapter 6A, Subchapter V

Public Health Service Act

Section III

Prescribed Forms

Unless otherwise indicated, DA Forms are available at the Army Publishing Directorate Web site <http://www.apd.army.mil> and DD Forms are available at the Office of the Secretary of Defense (OSD) Web site <http://www.dtic.mil/whs/directives/forms/index.htm>.

DA Form 5261-4

Student Loan Repayment Program Addendum (Prescribed in para 6-2.)

DA Form 5435

Statement of Understanding-The Selected Reserve Montgomery GI Bill (Prescribed in para 3-7.)

DA Form 5435-1

Statement of Understanding – The Selected Reserve Montgomery GI Bill – Kicker Program (Prescribed in para 3-23.)

DA Form 5447

Officer Service Agreement - Selected Reserve Education Assistance Program (Prescribed in para 3-4.)

DA Form 5536

Agreement Health Professionals Loan Repayment (HPLR) (Prescribed in para 8-3.)

DA Form 5685

New Specialized Training Assistance Program (New STRAP) Service Agreement (Prescribed in para 8-8f.)

DD Form 1131

Cash Collection Voucher (Prescribed in para 2-10.)

DD Form 2366

Montgomery GI Bill Act of 1984 (MGIB) Basic Enrollment (Prescribed in para 2-4.)

DD Form 2366-1

Montgomery GI Bill Act of 1984 (MGIB) Increased Benefit Contribution Program (Prescribed in para 2-10.)

DD Form 2384-1

Notice of Basic Eligibility (NOBE) (Prescribed in para 3-4.)

DD Form 2475

DOD Educational Loan Repayment Program (LRP) Annual Application (Cited in para 5-9.)

Section IV

Referenced Forms

Unless otherwise indicated, DA Forms are available at the Army Publishing Directorate Web site <http://www.apd.army.mil>; DD Forms are available at the Office of the Secretary of Defense (OSD) Web site <http://www.dtic.mil/whs/directives/forms/index.htm>; National Guard Bureau forms library is available at <http://www.ngbpc.ngb.army.mil/forms.htm>; and Veteran Affairs Forms are available at http://www.va.gov/vaforms/form_detail.asp?.

DA Form 11-2

Internal Control Evaluation Certification

DA Form 669

Army Continuing Education System (ACES) Record

DA Form 2028

Recommended Changes to Publications and Blank Forms

DA Form 2142

Pay Inquiry

DA Form 2171

Request for Tuition Assistance - Army Continuing Education System (ACES)

DA Form 3286

Statements for Enlistment, United States Army Enlistment Program, U.S. Army Delayed Enlistment

DA Form 4187

Personnel Action

DA Form 4836

Oath of Extension of Enlistment or Reenlistment

DD Form 4

Enlistment/Reenlistment Document - Armed Forces of the United States

DD Form 214

Certificate of Release or Discharge from Active Duty

DD Form 1966

Record of Military Processing-Armed Forces of the United States

DD Form 2088

Statement of Ecclesiastical Endorsement

DD Form 2558

Authorization to Start, Stop, or Change an Allotment

DD Form 2940

Statement of Entitlement to Educational Assistance for Reserve Components Supporting Contingency Operations and Certain National Emergency Response Operations

DD Form 2941

Statement of Irrevocable Election of Educational Assistance Benefits Based on Qualifying for Educational Assistance

NGB Form 600-7-5-R-E

ARNG Student Loan Repayment Program Addendum

NGB Form 810

Specialized Training Assistance Program Enrollment Verification

NGB Form 5435

Annex K to DD Form 4, Montgomery GI Bill Kicker Incentive Addendum, The Army National Guard of the United States

NGB Form 5435-1

Annex K to DD Form 4 (Supplemental), Montgomery GI Bill Kicker Incentive Addendum, The Army National Guard of the United States

VA Form 22-1990

Application for VA Education Benefits

VA Form 22-1990E

Application for Family Member to Use Transferred Benefits

VA Form 22-1999

VA Enrollment Certification

VA Form 22-5281

Application for Refund of Educational Contributions (VEAP, Ch. 32, Title 38, USC)

VA Form 22-5490

Dependent's Application for VA Education Benefits (Under Provisions of chapters 33 and 35, of title 38, USC)

Form W-2

Wage and Tax Statement (Available at <http://www.irs.gov>.)

**Appendix B
Army College Fund**

Since April of 1993, the following procedures have applied with respect to MGIB and ACF:

A Soldier enlists for a particular incentive (for example, \$50,000 MGIB/ACF package). Part of the \$50,000 entitlement is comprised of the basic MGIB (which increases from time to time as mandated by Congress) and part of it is made up of the ACF. Whatever the dollar amount is that comprises a Soldier's ACF at the time of enlistment, that ACF portion will never change (for that Soldier). ACF rates for a given Soldier are frozen at the time of their contract, although the Soldier will benefit from future increases to the basic MGIB.

The Army does; however, periodically adjust the ACF portion for future contracts whenever the basic MGIB amount changes. Thus, between FY 2000 and FY 2003, the basic MGIB full-time monthly rates for 3 or more year enlistees first increased from \$650 to \$672, and then to \$800, and finally to \$900. The FY 2011 rate was \$1,426 per month. Each time the basic MGIB amount increases, the Army will reduce the ACF portion of the total MGIB/ACF packages by a corresponding amount to offset the increase. In just 3 years then, while the maximum MGIB and/or ACF package remained at \$50,000, Soldiers who enlisted at different times during this time span, in effect, earned significantly different MGIB and/or ACF entitlement.

The actual entitlement for a Soldier who enlisted for the \$50,000 MGIB/ACF package in June 2001 is comprised of a frozen ACF \$26,600 portion. The MGIB basic rate at the time of this Soldier's enlistment was \$650.00 per month or a total of \$23,400 for 36 months of benefits (\$23,400 MGIB + \$26,600 ACF=\$50,000). A Soldier who enlisted for that same \$50,000 MGIB and/or ACF package in November 2001 (when basic rate increased from \$650 to \$672 per month or a total of \$24,192) will have an ACF portion of that \$50,000 equal to \$25,808. Whereas a Soldier who enlisted on 2 January 2002 for the \$50,000 MGIB/ACF package will have a frozen ACF portion of \$21,200, as the MGIB basic rate had just been increased to \$800 per month, which raises the total basic segment of the \$50,000 package for this Soldier to \$28,800.

Note. In the examples above, although all three of the Soldiers enlisted for the \$50,000 MGIB/ACF package, each has a different entitlement. All of these Soldiers will have at least \$50,000 in combined MGIB and/or ACF entitlement (provided they fulfill their enlistment and separate with a fully honorable discharge) and all will benefit from future increases to the basic MGIB rates. However, the first Soldier described has \$5,000 more in ACF entitlement than does the last Soldier, as the first Soldier enlisted when the ACF portion was a considerably larger percentage of the total \$50,000 MGIB/ACF package (for example, ACF=a fixed \$26,600 while basic=a changeable \$23,400).

Counseling a Soldier on their "exact" entitlement is quite complicated if the counselor is not aware of the basic MGIB rates and corresponding ACF values for a given month in each year since 1993. As of 1 October 2004, changes were made to the Servicemembers' contract to reflect exact MGIB and ACF amounts (in the form of a table). AEC counselors will advise all Soldiers to apply in writing to the DVA for MGIB/ACF benefits and provide a copy of their contract.

Appendix C

Veterans' Educational Assistance Program-Era Army College Fund (of Fiscal Years 1982–1985)

C–1. Authority

a. PL 94–502 established the ACF for FY 1981, which is codified in 38 USC Chapter 32. As a result of the assistance test, the Army adopted the ACF.

b. The Army set up the ACF to be as follows:

(1) An enlistment incentive.

(2) A means to increase test score Category I–IIIA accessions in critical MOSs.

c. The ACF is a kicker that supplements the basic VEAP entitlement.

C–2. Eligibility for enrollment and entitlement

The Soldier—

a. Has no PS enlistment.

b. Enlisted in the Active Army during the incentive test period of 1979–1981 or between 1 October 1981 and 30 June 1985 and entered AD before 1 July 1985.

c. Has high school diploma at time of accession.

d. Has AFQT score of 50 or above.

e. Enlisted in a specified MOS

f. Enrolled and participated in basic VEAP (see chap 10).

g. Enlisted with ACF as part of the enlistment contract.

C–3. Duration of eligibility (delimiting date)

Eligibility for ACF benefits extends 10 years from date of last discharge or REFRAD.

C–4. Entitlements

a. Soldiers earn the ACF by their participation in VEAP. The ACF incentive is in addition to the 2-for-1 matching funds available through VEAP.

b. The maximum ACF for FY 1981 through FY 1984 is as follows:

(1) \$8,000 for a 2-year enlistment.

(2) \$12,000 for an enlistment of 3 or more years.

c. The FY 1985 ACF added new kicker amounts as follows:

(1) \$12,900 for an enlistee with an associate degree (or equivalent).

(2) \$18,300 for an enlistment of 4 years.

d. Upon completion of the required minimum of 12 consecutive months in basic VEAP, a participant earns a portion of the Kicker and earns an additional portion every subsequent month. No more money is earned once the maximum amount is reached.

e. During a 3-year or 4-year enlistment, if the Soldier's monthly VEAP contribution exceeds \$75, the maximum personal contribution of \$2,700 will be reached in less than 36 months. In this event, the total Kicker authorized will be credited to the Soldier when \$2,700 has been contributed. Still, the VEAP account must remain active and the Soldier must complete the enlistment contracted for, or 36 months, whichever is less.

C–5. Forfeiting Army College Fund eligibility

Soldiers forfeit ACF eligibility if they—

a. Fail to obtain and to remain qualified for the MOS for which they enlisted. (Soldiers who contribute a minimum of 12 months in VEAP and remain qualified in their MOS for a minimum of 12 months may be eligible for a prorated share of the Kicker.)

b. Fail to participate for 12 consecutive months in VEAP.

c. Fail to complete 24 months of continuous AD.

d. Change initial MOS during their first enlistment for any reason other than normal career progression or reclassification at HQDA direction.

C–6. Distribution and duration of monthly benefits

a. Soldiers in ACF are eligible for the total entitlement (VEAP plus ACF) divided by the number of months of VEAP contribution, or 36 months, whichever is less.

b. The maximum duration of the benefits is as follows:

(1) 36 academic months if the student is participating in full-time study.

(2) The equivalent of 36 full-time academic months if student is engaged in less than full-time study.

C-7. Duration of eligibility (delimiting date)

Eligibility of benefits extends 10 years from date of last discharge or REFRAD.

C-8. Application procedures

a. Applicants must use VA Form 22-1990.

b. Applicants applying for assistance—

(1) *In the United States.* Send application to VARO in the State where the educational institution is located.

(2) Outside the United States. Send application to:

(a) For Atlantic localities: Department of Veterans Affairs Regional Office, PO Box 4616, Buffalo, NY 14240-4616.

(b) For Pacific localities: Department of Veterans Affairs Regional Office, PO Box 8888, Muskogee, OK 74402-8888.

(3) *Outside the United States and attending American schools at overseas installations.* Submit applications through the school. VARO nearest the stateside campus will process.

Appendix D Internal Control Evaluations

Section I Student Loan Repayment Program

D-1. Function

The function of this evaluation the Student Loan Repayment Program.

D-2. Purpose

The purpose of this evaluation is to assist HRC in evaluating its key internal controls. It is intended as a guide and does not cover all controls.

D-3. Instructions

Answers must be based on the actual testing of key internal controls (for example, document analysis, direct observation, interviewing, sampling, simulation, or other). Answers that indicate deficiencies must be explained and the corrective action identified in supporting documentation. These internal controls must be evaluated at least once every 5 years. Certification that this evaluation has been conducted must be accomplished on DA Form 11-2 (Internal Control Evaluation Certification).

D-4. Test questions

- a. Does HRC ensure only qualifying loans are paid?
- b. Are Soldiers' LRP packets verified annually by HRC (see DD Form 2475)?
- c. Are the steps in the processing of loan repayment followed as required in chapters 5 through 8?
- d. Does DFAS make payment within 90 days of receipt of HRC notification?

D-5. Supersession

Not applicable.

D-6. Comments

Help make this a better tool for evaluating internal controls. Submit comments to Commander, U.S. Army Human Resources Command, Education Incentive Branch (AHRC-PDE-I (Dept 410)), 1600 Spearhead Division Avenue, Fort Knox, KY 40122-5401.

Section II Veterans Educational Assistance Program, Montgomery GI Bill, Post-9/11 GI Bill, and Army College Fund

D-7. Function

Management of VEAP, MGIB, Post-9/11 GI Bill and the ACF.

D-8. Purpose

The purpose of this evaluation is to assist ACES in evaluating its key internal controls. It is intended as a guide and does not cover all controls.

D-9. Instructions

Answers must be based on the actual testing of key internal controls (for example, document analysis, direct observation, interviewing, sampling, simulation, or other). Answers that indicate deficiencies must be explained and the corrective action identified in supporting documentation. These internal controls must be evaluated at least once every 5 years. Certification that this evaluation has been conducted must be accomplished on DA Form 11-2.

D-10. Test questions

a. Do counselors provide accurate, up-to-date information on the educational benefits available to Soldiers through VEAP, MGIB, Post-9/11 GI Bill, or ACF in accordance with this regulation?

b. Do counselors identify and then brief LRP participants using LRP counseling checklist in accordance with AR 621-5?

c. Do education records indicate that counselors provide mandatory Veteran's benefits counseling on VEAP, MGIB, Post-9/11 GI Bill, and ACF (in accordance with 10 USC 1142) to Soldiers NLT 90 days prior to separation?

d. Are counselors aware of the requirements Soldiers must meet to qualify for and remain qualified for the ACF and LRP?

e. Do counselors ensure Soldier acknowledges counseling on Post-9/11 GI Bill, VEAP, and MGIB by signing DA Form 669 (or electronically generated versions of same)?

f. Do counselors provide veteran's benefits counseling to Soldiers requesting early discharge who would lose MGIB/ACF benefits by accepting voluntary early discharge prior to meeting eligibility requirements and is a copy of DA Form 669 acknowledging this counseling included as a part of the request for voluntary early separation?

g. Do ESOs follow up to identify Soldiers who do not come for mandatory counseling?

h. Are procedures in place with the Military Personnel Directorate Chiefs, and ESOs to ensure that Soldiers receive mandatory counseling?

i. Are procedures in place with the installation commander to ensure that, in accordance with AR 600-8-101, all Soldiers will out-process at the education center to obtain their DA Form 669?

D-11. Supersession

Not applicable.

D-12. Comments

Help make this a better tool for evaluating internal controls. Submit comments to Commander, U.S. Army Human Resources Command, Education Incentives Branch (AHRC-PDE-I) (Department 410), 1600 Spearhead Division Avenue, Fort Knox, KY 40122-5401

Glossary

Section I Abbreviations

ACES

Army Continuing Education System

ACF

Army College Fund

ACSIM

Assistant Chief of Staff for Installation Management

AD

active duty

ADSO

active duty service obligation

AEC

Army Education Center

AFQT

Armed Forces Qualification Test

AGR

Active Guard Reserve

AHS

Academy of Health Sciences

AKO

Army Knowledge Online

AMEDD

U.S. Army Medical Department

AN

Army Nurse Corps

ARNG

Army National Guard

ARNGUS

Army National Guard of the United States

AT

annual training

BT

basic training

CAR

Chief, Army Reserve

CG

commanding general

CHLRP

Chaplain Loan Repayment Program

CMO

career management officer

CNGB

Chief, National Guard Bureau

COG

convenience of the Government

DA

Department of the Army

DC

Dental Corps

DCS

Deputy Chief of Staff

DFAS

Defense Finance and Accounting Service

DEERS

Defense Eligibility Enrollment Reporting System

DMDC

Defense Manpower Data Center

DMOSQ

duty military occupational specialty qualified

DOD

Department of Defense

DODI

Department of Defense instruction

DVA

Department of Veterans Affairs

EAD

extended active duty

EATP

Educational Assistance Test Program

ESO

education services officer

ETS

expiration term of service

FAO

finance and accounting office

FY

fiscal year

GI

Government Issue

GS

general series

HPLR

health professionals loan repayment

HPLRP

Health Professionals Loan Repayment Program

HQDA

Headquarters, Department of the Army

HRC

U.S. Army Human Resources Command

IADT

initial active duty for training

IMA

individual mobilization augmentee

IMCOM

Installation Management Command

ING

Inactive National Guard

i-PERMS

interactive Personnel Electronic Records Management System

IRR

Individual Ready Reserve

LRP

Loan Repayment Program

MC

Medical Corps

MDSSP

Medical and Dental Student Stipend Program

MEPS

military entrance processing station

MGIB

Montgomery GI Bill

MGIB-AD

Montgomery GI Bill-Active Duty

MGIB-SR

Montgomery GI Bill-Selected Reserve

MOS

military occupational specialty

MRD

mandatory retirement date

MS

medical service corps

NDAA

National Defense Authorization Act

NGB

National Guard Bureau

NOBE

Notice of Basic Eligibility

NPS

nonprior service

NSLDS

National Student Loan Data System

OBC

officer basic course

OCS

Officer Candidate School

OMPF

official military personnel file

OSM

Officer Strength Manager

PL

public law

PMO

personnel management officer

PS

prior service

RC

Reserve Component

RCP

retention control point

REAP

Reserve Education Assistance Program

REFRAD

release from active duty

RIF

reduction in force

RMSO

remaining military service obligation

ROTC

reserve officers' training corps

ROTCS

Reserve Officers' Training Corps Scholarship

SECARMY

Secretary of the Army

SELRES

Selected Reserve

SIM

State Incentive Manager

SLRP

Student Loan Repayment Program

SMP

Simultaneous Membership Program

SRIP

Selected Reserve Incentive Program

SROTC

Senior Reserve Officers' Training Corps

SSB

special separation benefits

STRAP

Specialized Training Assistance Program

TA

tuition assistance

TEB

Transferability of Education Benefits

TPU

troop program unit

TSG

The Surgeon General

TJAG

The Judge Advocate General

USAR

U.S. Army Reserve

USARC

U.S. Army Reserve Command

USAREC

U.S. Army Recruiting Command

USC

United States Code

USMA

U.S. Military Academy

VA
Veterans Affairs

VARO
Veterans Affairs Regional Office

VEAP
Veterans Education and Assistance Program

VONAPP
Veterans On Line Application

VSI
voluntary separation incentive

WO
warrant officer

Section II

Terms

20/30 Month Rule

Applies to discharges for the COG and requires that Soldiers whose initial obligations are less than 3 years must complete at least 20 months of continuous AD or Soldiers whose initial obligations are 3 or more years must complete at least 30 months of continuous AD in order to meet time-in-service requirements to qualify for educational entitlement under the MGIB.

Active Guard Reserve personnel

Army National Guardsmen and Army Reservists who are on full-time AD to support National Guard and RC activities.

Break in service

A period of more than 90 days between the date when individuals are released from AD (or otherwise receive a complete separation from AD service) and the date they reenter on AD (up to 365 days).

Continuous active duty

AD served without interruption.

Critical skill

Skill or specialty designated by the SECARMY as a skill or shortage in which there is a critical shortage of personnel or for which it is difficult to recruit.

Delayed entry program

Allows individuals to contract to go on AD in the Army at a later date.

Equivalency certificate

A credential awarded based on successful completion of any of the following: General Education Development certificate, high school diploma based on general educational diploma, correspondence school, California High School Proficiency Examination, high school attendance certificate, high school completion certificate, adult education certificate or diploma, or 'xternal' or competency based diploma.

Kicker

Benefits awarded at the discretion of the SECARMY for Soldiers who serve in specified critical job areas for a prescribed period in the Army in addition to the other requirements for eligibility for the basic benefits. These amounts are added to any other education benefits to which the individual may be entitled.

Post-9/11 GI Bill - Armed Forces

For the purposes of Post-9/11 GI Bill, the term Armed Forces includes all AD, SELRES, and IMA service regardless of branch of Service or component. It does not include those who have retired, membership in the IRR, or those who have been discharged or separated from the Armed Forces.

Qualifying term of service

The period of service when full entitlement to education benefits is earned.

Selected Reserve

Refers to the USAR and the ARNGUS and is composed of those units and individuals participating in the IMA Program, TPU, and AGR.

Top-Up

The name given to the DVA program that allows a Soldier to combine AD MGIB benefits (38 USC Chapter 30) with Army TA in cases in which the cost of the course exceeds the TA rate cap.

Section III**Special Abbreviations and Terms**

This section contains no entries.

UNCLASSIFIED

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