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***Army Regulation 621–202**

Effective 13 December 2023

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. The portions affected by this major revision are listed in the summary of change.

Authorities. This regulation implements the Public Laws specified within and provides information on Title 38, United States Code Chapters 30 through 34 and Title 10 United States Code Chapter 1606.

Applicability. This regulation applies to the Regular 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 requirements.

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 app C).

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 (DAPE–MPA), usarmy.pentagon.hqda-dcs-g-1.mbx.dmpm-eib-branch@mail.mil.

Distribution. This regulation is available in electronic media only and is intended for the Regular Army, the Army National Guard/Army National Guard of the United States, and the U.S. Army Reserve.

*This regulation supersedes AR 621-202, dated 26 September 2017.

SUMMARY of CHANGE

AR 621–202
Army Educational Incentives and Entitlements

This major revision, dated 13 November 2023—

- Changes transfer of education benefits eligibility for Soldiers with a Purple Heart (paras 4–15a and 4–15d(8)).
- Adds authorized exceptions for failure to complete transfer of education benefits service agreement (paras 4–15d(8) through 4–15d(10)).
- Clarifies Student Loan Repayment Program eligibility (para 6–2c).
- Adds authorization for Soldiers accepted into the Active Guard Reserve program to retain their Student Loan Repayment Program incentive (para 6–2h).
- Adds examples for calculating entitlement and making disbursement (para 6–6a).
- Updates continued receipt of Student Loan Repayment Program incentives (para 6–7).
- Updates reinstatement of Student Loan Repayment Program incentives (para 6–8).
- Updates recoupment of Student Loan Repayment Program incentives (para 6–9).
- Adds authorization for Soldiers accepted into the Active Guard Reserve program to retain their Chaplain Loan Repayment Program incentive (para 7–2g).
- Incorporates policy from DoDI 1341.13 (throughout).

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Chapter 1 Introduction

Section I

General

1–1. Purpose

This regulation establishes policy for educational incentives and entitlements authorized by Public Law (PL). It provides Regular Army, Army National Guard (ARNG), Army National Guard of the United States (ARNGUS), and U.S. Army Reserve (USAR) unique policies, procedures and responsibilities governing educational benefits for Soldiers of the Active and Reserve Components (RCs). Soldier, unless otherwise specified, refers to enlisted personnel and officers.

1–2. References, forms, and explanation of abbreviations

See appendix A. The abbreviations, brevity codes, and acronyms (ABCAs) used in this electronic publication are defined when you hover over them. All ABCAs are listed in the ABCA directory located at <https://armypubs.army.mil/>.

1–3. Associated publications

This section contains no entries.

1–4. Responsibilities

See section II of this chapter.

1–5. Records management (recordkeeping) requirements

The records management requirement for all record numbers, associated forms, and reports required by this publication are addressed in the Records Retention Schedule–Army (RRS–A). Detailed information for all related record numbers, forms, and reports are located in Army Records Information Management System (ARIMS)/RRS–A at <https://www.arims.army.mil>. If any record numbers, forms, and reports are not current, addressed, and/or published correctly in ARIMS/RRS–A, see DA Pam 25–403 for guidance.

Section II

Responsibilities

1–6. Assistant Secretary of the Army (Manpower and Reserve Affairs)

The ASA (M&RA) will develop and oversee policies and programs for Army educational entitlements and incentives.

1–7. Chief of Public Affairs

The CPA will communicate maximum information concerning educational incentives and entitlements to Soldiers.

1–8. Deputy Chief of Staff, G–1

The DCS, G–1 will provide advice and assistance to the ASA (M&RA) concerning policies and budget requirements for all education incentive programs.

a. On behalf of the DCS, G–1, the Director of Military Personnel Management will—

(1) Establish semiannual working groups including U.S. Army Human Resources Command (HRC), ARNG, ARNGUS, and USAR representatives to resolve concerns within the Post-9/11 GI Bill Transfer of Education Benefits (TEB) Program. Representatives from the Defense Manpower Data Center (DMDC) and the U.S. Department of Veterans Affairs (DVA) should be invited to the working group.

(2) Designate a Post-9/11 GI Bill TEB site security manager for the Regular Army TEB service representative web application called Benefits for Education Administrative Services Tool (BEAST) and ensure access to BEAST will be coordinated between the designee and all commands.

b. On behalf of the DCS, G–1, the Commanding General (CG), HRC will—

(1) Develop, maintain, and provide, in consultation with the Education Incentives Branch (EIB), a standardized Montgomery GI Bill–Active Duty (MGIB–AD) briefing given at the reception battalions and officer basic courses (OBCs) to eligible MGIB–AD enrollees.

(2) Be the functional proponent for programs listed in this regulation (except Student Loan Repayment Program (SLRP)–USAR and ARNG Programs).

(3) Maintain service obligation data, service remaining requirement data, and all other data requirements needed to manage education programs in the Enlisted Master File, the Officer Master File, and other applicable systems (such as the Integrated Personnel Electronic Records Management System (iP-ERMS)) for Regular Army Soldiers.

(4) Provide the day-to-day management of the Montgomery GI Bill (MGIB), Post-9/11 GI Bill, Veterans Education and Assistance Program (VEAP), Army College Fund (ACF), Regular Army Loan Repayment Program (LRP), and Educational Assistance Test Program (EATP) (Education Assistance (901), Loan Forgiveness (902), and Noncontributory VEAP (903)).

(5) Correct and verify education incentive and entitlement data identified as incorrect by the Army, DMDC, or DVA.

(6) Respond to inquiries pertaining to programs listed in this regulation from Army agencies, DMDC, DVA, DoD, financial institutions, individual Soldiers and veterans.

(7) Provide training and reference materials to the U.S. Army Recruiting Command (USAREC) on an as-needed basis.

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

(9) Participate in semiannual working groups as scheduled by the DCS, G–1.

(10) Act as the Post-9/11 GI Bill TEB certifying official for all Regular Army Soldiers in the grades of O–1 to O–6, W–1 to W–5, and E–1 to E–9 who request to transfer unused Post-9/11 GI Bill benefits and perform a quarterly quality review of at least 25 TEB transactions processed during the previous quarter.

(11) Make subject matter experts available to provide Regular Army guidance to DVA, DoD, DMDC, and USAREC.

(12) Fulfill the program responsibilities listed in this regulation.

c. On behalf of the DCS, G–1, the Chief, General Officer Management Office will act as certifying official for Regular Army general officers who request to transfer unused Post-9/11 GI Bill benefits.

1–9. 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.

1–10. Chief, National Guard Bureau

The CNGB will—

a. Provide input on matters of policy, implementing guidance, and resourcing for the administration of educational incentives and entitlements for ARNG Soldiers.

b. Train all ARNG education and incentive staff on policies, procedures, and Department of the Army (DA) and ARNG guidance pertaining to education incentives and entitlements, including the presentation of Post-9/11 GI Bill, MGIB–AD, Montgomery GI Bill–Selected Reserve (MGIB–SR), MGIB–SR Kicker, and SLRP standardized benefits briefings.

c. Ensure required data elements are maintained within the Guard Incentives Management System (GIMS) or other systems as applicable.

d. Appoint certifying officials for all ARNG Soldiers who request to transfer unused Post-9/11 GI Bill benefits.

e. Provide the day-to-day management of the Post-9/11 GI Bill for ARNG Soldiers.

f. Establish a method to correct and verify education incentive and entitlements data identified as incorrect by the Army, DMDC, or DVA.

g. Respond to inquiries pertaining to programs listed in this policy from Army agencies, DMDC, DVA, DoD, individual Soldiers, Families, and veterans.

h. Make subject matter experts available for DVA, DoD, DMDC, and USAREC.

i. Participate as an active member in the policy formulation process.

j. Act as the TEB site security manager for the ARNG.

k. Perform quarterly quality reviews of at least 25 TEB transactions processed during the previous quarter.

- l.* Participate in semiannual working groups as scheduled by the DCS, G-1.

1-11. Chief, Army Reserve

The CAR will be responsible for educational incentives and entitlements for Active Guard Reserve (AGR) and USAR Soldiers. The CAR will—

- a.* Be the functional proponent for the SLRP-USAR by certifying, maintaining, executing, and providing day-to-day management of the SLRP-USAR.
- b.* Provide implementation guidance within the USAR to govern the administration of the Post-9/11 GI Bill consistent with this regulation and other guidance issued by the DCS, G-1.
- c.* Act as the certifying official for all USAR Soldiers who request to transfer unused Post-9/11 GI Bill benefits.
- d.* Ensure all USAR Soldiers are notified of Post-9/11 GI Bill benefits prior to demobilization (individual or group setting, or official Army websites/communications).
- e.* Maintain service obligation data, service remaining requirement data, and all other data requirements needed to manage the Post-9/11 GI Bill within the Enlisted Master File, the Officer Master File, and other applicable systems for USAR Soldiers.
- f.* Provide the day-to-day management of the MGIB-AD, MGIB-SR, Post-9/11 GI Bill, VEAP, ACF, and the SLRP.
- g.* Establish a method to correct and verify education incentive and entitlements data identified as incorrect by the Army, DMDC, or the DVA.
- h.* Respond to inquiries pertaining to programs listed in this policy from Army agencies, DMDC, DVA, DoD, individual Soldiers, Families, and veterans.
- i.* Provide subject matter experts for DVA, DoD, DMDC, and USAREC.
- j.* Participate as an active member in the policy formulation process.
- k.* Act as the TEB site security manager for the USAR.
- l.* Perform quarterly quality reviews of at least 25 TEB transactions processed during the previous quarter.
- m.* Participate in semiannual working groups as scheduled by the DCS, G-1.

1-12. The Judge Advocate General

TJAG should provide, in consultation with HRC, EIB (AHRC-PDP-E), a standardized Post-9/11 GI Bill and MGIB briefing to be presented to all Judge Advocate General officers who attend the judge advocate (JA) OBC. In addition, TJAG should ensure the JA LRP documents are loaded into iPERMS to identify JA LRP participants so their first 3 years of Regular Army service will be considered nonqualifying for Post-9/11 GI Bill purposes.

1-13. Chief of Chaplains

The CCH will provide, in consultation with the ASA (M&RA) through HRC, EIB (AHRC-PDP-E), a standardized Post-9/11 GI Bill briefing to be presented in conjunction with the standardized MGIB briefing to all chaplains who attend the Chaplain Basic Officer Leadership Course. Because the chaplain LRP is for USAR members only, the service obligation timeframe will not be excluded for Post-9/11 GI Bill purposes.

1-14. Commanders of Army commands, Army service component commands, and direct reporting units

Commanders of ACOMs, ASCCs, and DRUs, in conjunction with Army Credentialing and Continuing Education Services for Soldiers (ACCESS), will ensure all Soldiers who have not processed through a reception battalion or OBC are educated regarding the Post-9/11 GI Bill.

1-15. Commanding General, U.S. Army Materiel Command

The CG, AMC, through the CG, U.S. Army Installation Management Command (IMCOM) will—

- a.* Train all ACCESS counselors on basic policies, procedures, and DA guidance pertaining to education incentives topics, including the delivery and presentation of Post-9/11 GI Bill, MGIB, ACF, and SLRP standardized benefits briefings.
- b.* Through education services officers (ESOs)—
 - (1) Maintain current educational benefits regulations and other related reference materials.

(2) Provide counseling, which may be done individually or in a group setting, on educational entitlements and requirements (including MGIB, Post-9/11 GI Bill, ACF, and LRP).

(3) Conduct educational benefits training sessions for counseling staff to ensure counseling staff knowledge acquisition.

(4) Conduct mandatory educational benefits counseling for all Soldiers separating from the Army as required by Section 1142, Title 10, United States Code (10 USC 1142).

(5) Record in ArmyIgnitED (formerly GoArmyEd) Communication Tracking System (CTS) individual veteran education benefits to document counseling.

(6) Ensure individual counseling notes are entered in ArmyIgnitED (formerly GoArmyEd) using the CTS note system for each Soldier counseled on GI Bill benefits in accordance with 10 USC 1142.

(7) Follow procedures outlined in AR 621–5 for GI Bill benefits and other programs, as applicable.

1–16. Commanding General, U.S. Army Training and Doctrine Command

The CG, TRADOC, through the CG, USAREC 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 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, EIB (AHRC–PDP–E) on all Regular Army LRP, MGIB–AD, MGIB–SR, and Post-9/11 GI Bill related advertising before release.

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

f. Identify those Soldiers whose contracts specify ACF entitlements.

g. Fulfill the program responsibilities listed in this regulation, including those listed in paragraph 5–3.

1–17. Education services officers

ARNG ESOs, if so delegated, will—

a. Maintain current educational benefits policies, regulations, and other related reference materials.

b. Conduct educational benefits training sessions or counseling staff.

c. Provide counseling on educational incentives, entitlements, and requirements (including MGIB–AD, MGIB–SR, MGIB–SR Kicker, Post-9/11 GI Bill, and SLRP).

d. Conduct and/or coordinate educational benefits counseling for all newly assigned Soldiers and Soldiers separating from the ARNG.

e. Ensure all ARNG Soldiers are notified of Post-9/11 GI Bill benefits prior to demobilization.

Chapter 2

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

Section I

The Montgomery GI Bill—Active Duty

2–1. Authority

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

2–2. Objective

a. To help readjust and restore lost educational opportunities for those individuals who served on active duty and interrupted their civilian careers.

b. To promote the All-Volunteer Force Program and the Total Force Concept of the Armed Forces in accordance with 38 USC 3001.

2-3. Eligibility

- a. Soldiers eligible for MGIB-AD are those who—
- (1) Entered active duty for the first time after 30 June 1985.
 - (2) Entered active duty for the first time as a Title 10 USC AGR after 30 June 1985, or after 29 November 1989 as a Title 32 USC AGR Soldier who meet the basic eligibility requirements listed in this paragraph. Title 32 USC AGR Soldiers who performed active duty between 30 June 1985 and 29 November 1989 who elected to receive coverage under MGIB-AD within 9 months of 9 October 1996 are also eligible.
 - (3) Completed a qualifying term of service.
 - (a) Served 3 or more years of continuous active duty if the obligated period of service was 3 or more years; or
 - (b) Served 2 or more years of continuous active duty if the obligated period of service was less than 3 years; or
 - (c) Served 2 years continuous active duty plus 4 years in the Selected Reserve (SELRES).
 - (d) A qualifying term of service includes Title 10 USC and Title 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) Reduced from pay or contributed \$1,200 to the U.S. Department of Treasury.
 - (6) After completion of the qualifying service—
 - (a) Separate from active duty with a fully Honorable discharge; or
 - (b) Continue on active duty.
- b. Exceptions to completing the first qualifying term of service are as follows:
- (1) The Soldier has been discharged or released from active duty for a service-connected disability, by reason of a sole survivorship discharge (as defined in 10 USC 1174(i)), for a medical condition which pre-existed active duty, 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 active duty 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 active duty obligation is less than 3 years must complete at least 20 months of continuous active duty.
 - (b) Soldiers whose initial active duty obligation is 3 or more years must complete at least 30 months of continuous active duty.
 - (3) Soldiers who are separated involuntarily for the COG because of a reduction in force (RIF) 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. Soldiers involuntarily separated in a RIF action with less than the 20/30 months of continuous active duty 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 defined in 10 USC 1174(i)), nonservice-connected disability that pre-existed service, condition interferes with duty or RIF and subsequently re-entering active duty, 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 active duty 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) Paragraph 2-3b(3) 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 active duty 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 active duty.

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

(c) Paragraph 2–3b(4) is retroactive to 1 July 1985, but only applies to training pursued after 1 October 1993.

c. MGIB–AD provides an opportunity for Soldiers to increase their benefits or, if they failed to meet the in-service requirement, another opportunity to earn education benefits. This is referred to as the 2x4 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 active duty 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 active duty, they may re-establish 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 active duty 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–AD once the individual has served 36 months. Therefore, the 4-year enlistee earns the MGIB–AD after the first 36 months of continuous active duty (ACF is earned by each month served; therefore, ACF will be prorated).

(3) 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) For the Soldier entitled to full ACF, records counseling with the following statement: “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 MGIB–AD and I am not eligible to receive a refund of monies reduced from my base pay.”

(d) For the Soldier who enlisted for ACF, has met time in service requirements, but has not earned the entire ACF, records counseling with the following statement: “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.”

(e) Requires Soldier to sign the appropriate counseling statement from paragraph 2–3e(3)(c) or 2–3e(3)(d) acknowledging this mandatory counseling.

(f) Provides the Soldier with a copy of counseling 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 a Reserve Officers’ Training Corps Scholarship (ROTCS) under 10 USC 2107, except that PL 104–201 allows ROTCS graduates who entered active duty as a commissioned officer after 30 September 1996 and received \$2,000 or less in any one school year under that program, 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. This law applies to 38 USC Chapter 30 benefits paid for months beginning after 27 December 2001.

b. All such officers outlined in paragraph 2-4a 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.

c. Officers outlined in this paragraph who previously established MGIB eligibility as an enlisted Soldier will retain their eligibility after receipt of commission.

d. PL 106-419 repealed the requirement for establishing the initial obligated period of active duty 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.

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

f. Individuals who served in RCs who were on active duty 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 release from active duty (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 active duty 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 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 Veterans Affairs Regional Office (VARO) for extensions.

2-7. Processing Montgomery GI Bill eligibles

Processing will 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 active duty or AGR. 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. The CG, TRADOC, through the CG, 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 by completing items 1 and 2 for all Soldiers (five copies).

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

b. The CG, AMC, through the CG, 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) Complete 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) Complete 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 GS-7 or military grade E-7 and above.

c. The CCH and the Commandant, Academy of Health Sciences (AHS)—

(1) Provide the MGIB–AD 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 2–7*b*.

d. The Defense Finance and Accounting Service (DFAS) automatically reduces the basic pay by \$100 each month for the first full 12 months on all eligible active duty 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 nonrefundable. DFAS inputs a stop GI Bill only when:

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

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

(a) Enrollments of individuals with service prior to 1 July 1985.

(b) Enrollments of Reserve Officers' Training Corps (ROTC) recipients/Service academy graduates.

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

(3) All exceptions to this policy must be granted by the CG, HRC, EIB (AHRC–PDP–E) or DCS, G–1 (DAPE–MPA).

e. Senior commanders at a Soldier's first permanent duty station will process Soldiers who have not initially processed at the MEPS or reception battalion, for example, Soldiers who have completed basic training and advanced individual training on Reserve status and in-process on active duty at a first permanent duty station or Soldiers entering the OBC. During in-processing, commanders—

(1) Identify Soldiers not yet MGIB–AD processed.

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

(3) Complete items 1, 2, and 5 of DD Form 2366 for all individuals deciding to disenroll from the MGIB–AD.

(4) Distribute DD Form 2366 in accordance with the procedures outlined in paragraph 2–7*f*.

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, permanent duty station, and commanders, when applicable. The distribution is as follows:

(1) The Army Military Human Resource Record (AMHRR), located in iPERMS.

(2) Local finance office.

(3) Electronic military personnel office.

g. ARNG ESOs process AGR Soldiers who have not previously enrolled or disenrolled in MGIB–AD. During in-processing, ESOs—

(1) Brief and counsel Soldiers on their benefit options.

(2) Ensure completion of DD Form 2366.

(3) Forward the following documents to the ARNG Education Support Center (ESC):

(a) Initial AGR orders.

(b) Completed DD Form 2366.

(c) For those who chose to enroll, election of the \$1,200 reduction in pay or lump sum payment. The ESC coordinates the allotments directly with DFAS.

(4) Upon receipt of the documents, ESC reviews and verifies eligibility, coordinates the allotment or payment with DFAS, and distributes the official DD Form 2366 along with proof of payment to the Soldier's state education office. A copy will be uploaded in the individual Soldier's record in GIMS database.

(5) The ESO will distribute the official DD Form 2366 to the Soldier and Soldier's iPERMS file.

h. Soldiers who are currently eligible for the MGIB–AD and are currently serving on active duty may elect to enroll into the MGIB–AD Plus-Up Program. This option allows Soldiers to make up to a \$600 contribution into this program to receive up to a \$150 per month increase in full-time MGIB–AD benefits. Contributions into the Plus-Up Program are not refundable if MGIB–AD eligibility is relinquished for Post-9/11 GI Bill eligibility.

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 active duty after 30 June 1985. (Previous laws/guidance governing academy graduates and ROTCS recipients still apply.) Lack of a DD Form 2366 in the Soldier's AMHRR is considered evidence that the Soldier was not counseled properly upon entering active duty.

b. Montgomery GI Bill finance issues. DFAS automatically enrolls any Soldier entering active duty 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. DFAS automatically enrolls all Soldiers and only takes action on disenrollments. Anyone not automatically enrolled in the MGIB, absent appropriate disenrollment documentation, 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, 8899 East 56th Street, Indianapolis, IN 46249-0672.

2-9. Basic benefits

Benefits are payable for DVA-approved educational programs pursued on a full-time or part-time basis. A Soldier may receive up to 36 months of benefit from any one GI Bill Program, and up to 48 months of benefits from two or more programs combined. MGIB-AD payment rates increase annually based on the undergraduate tuition. Changes may occur annually at the beginning of each fiscal year (FY). Current rates are available on the DVA website available at <https://www.benefits.va.gov/gibill/>. Duplication of benefits is prohibited. 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 in this paragraph, 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.

- a. Vocational Rehabilitation under 38 USC Chapter 31.
- b. VEAP under 38 USC Chapter 32.
- c. Vietnam-Era GI Bill under 38 USC Chapter 34.
- d. Educational Assistance Program for members of the SELRES (MGIB-SR under 10 USC Chapter 1606) and educational assistance for persons enlisting for active duty (DoD FY 1981 EATP under 10 USC 2141).
- e. LRP or Health Professionals 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 active duty service.
- f. Post-9/11 GI Bill under 38 USC Chapter 33.

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 <https://www.benefits.va.gov/gibill/>.

2-11. In-service use eligibility

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

2-12. Application for benefits

Applicants will—

- a. Go to an Army education center (AEC) for counseling.
- b. Complete VA Form 22-1990 (available at <https://www.va.gov/find-forms/>).
- c. Submit online or forward VA Form 22-1990 to appropriate VARO.
 - (1) *Eastern Region.* Veterans Administration Regional Office, PO Box 4616, Buffalo, NY 14240-4616.
 - (2) *Western Region.* Veterans Administration Regional Office, PO Box 8888, Muskogee, OK 74402-8888.

Section II

The Army College Fund

2-13. Authority

38 USC 3001 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 A accessions in entry-level skills.

2-15. Eligibility

Enlisted Soldiers must—

- 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 active duty. 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

- a. The ACF term of enlistment is determined by the most recent Headquarters, Department of the Army (HQDA) incentives message (DAPE-MPA).
- b. ACF 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. ACF is not available to officers.

2-17. Maximum monthly benefits

- a. Soldiers entering active duty prior to 1 April 1993 will receive the ACF amount stated in their enlistment contracts. Soldiers entering active duty 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. Since 1 April 1993, the MGIB and ACF amounts have been presented 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 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 on or after 1 October 2004 were and are subject to a DoD-imposed cap that may or may not negate further ACF.
- c. All Soldiers 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), when they apply in writing for benefits determination using VA Form 22-1990. DA Form 3286 (Annex B) 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 exceptions.

2-19. Army College Fund eligibility exclusions

- a. Eligibility for the ACF will be relinquished when a Soldier—
 - (1) Does not satisfy active duty 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

- a. For specific enlistment procedures, refer to AR 601-210.
- b. The CG, TRADOC, through the CG, USAREC—
 - (1) Ensures accuracy of DD Form 1966 per AR 601-210.
 - (2) Ensures ACF procedures are listed on DD Form 1966, Section VI, Remarks.
 - (3) Completes DD Form 2366, item 1.
 - (4) Annotates DD Form 2366, item 4.
 - (5) Annotates on DA Form 3286 (Annex B) that the Soldier has selected the ACF as an enlistment incentive option. The total amount reflected on DA Form 3286 (Annex B) is the combined benefits for MGIB and ACF.
 - (6) Forwards copies of both forms with the accession packet to the reception battalion.
- c. The CCH and Commandant, AHS—
 - (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 Vietnam-Era GI Bill Eligibles to the Montgomery GI Bill

2-21. Authority

- a. 38 USC Chapter 34 authorizes 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

Under 38 USC Chapter 34, Vietnam-Era GI Bill eligibles may receive the basic benefit under the MGIB, plus half of what their monthly Vietnam-Era GI Bill 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 Vietnam-Era GI Bill 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. Conversion of the Vietnam-Era GI Bill to the MGIB entitles any Soldier who served on active duty for 181 days or more. Any part of the active duty must have occurred after 31 January 1955 and before 1 January 1977. In addition, the Soldier must have—
 - (1) Been released under conditions other than Dishonorable.
 - (2) Continued active duty.
 - (3) Been discharged under other than Dishonorable conditions with less than 181 continuous days of active duty due to a service-connected disability.

b. Soldiers who entered active duty 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 active duty on or before 2 January 1978.

- c. The required 181 continuous days on active duty 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 active duty 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 paragraphs 2–24a(1) or 2–24a(2).

(1) Entered on active duty 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 active duty 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 active duty 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 active duty on 19 October 1984, and must have served at least 3 years of continuous active duty 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 active duty between 1 January 1977 and 30 June 1985.

b. Eligible Soldiers must have—

- (1) Been discharged with an Honorable discharge.
- (2) Continued active duty.
- (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 preseparation 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, they should provide a copy of the relevant documents from their AMHRR, along with copies of all DD Forms 214 (Certificate of Uniformed Service).

(2) Prior to REFRAD, if a Soldier plans to use benefits within 6 months of separation, they should either print out a copy of their AMHRR using their Army Knowledge Online account or order a copy of their AMHRR through their personnel command channels.

2–25. Conversion of benefits

Determination of eligibility and amount of benefit are the ultimate 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 exceptions.

2–27. Application for benefits

To apply for benefits, Soldiers should complete VA Form 22–1990 (available at <https://www.va.gov/find-forms/>).

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. Authority

a. This entitlement is codified in 10 USC Chapter 1606, regulated by the Secretary of Defense (SECDEF), and administered by the Secretary of Veterans Affairs. This chapter provides the ARNGUS and USAR with policy and procedures necessary to support the educational assistance program in compliance with DoD and DVA regulations.

b. The respective RC determines eligibility for the MGIB–SR. 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 members of the Army, Navy, Air Force, Marine Corps, and Coast Guard Reserves, as well as the ARNG and the Air National Guard.

b. An eligible Reserve Soldier may receive 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 <https://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. The SELRES does not include Soldiers assigned to the Individual Ready Reserve (IRR).

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

3–4. Eligibility

A Soldier is eligible for educational assistance under the MGIB–SR after meeting the following requirements:

a. Enlists, reenlists, or extends an enlistment as a Reserve Soldier 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.

b. Completes initial active duty for training (IADT). IADT is defined as the period required to qualify in the selected MOS or training sufficient to be deployed; nonprior 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 (ACASP) 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 before applying for MGIB–SR entitlement. In the case of a Soldier 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.

d. Remains in good standing in a drilling SELRES unit or as an IMA.

e. 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 must sign a DA Form 5447 (Officer Service Agreement–Selected Reserve Education Assistance Program) in order to continue to receive MGIB–SR 10 USC Chapter 1606 entitlements.

f. 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–SR retains such entitlement on conversion to ROTC in (nonscholarship) cadet status and participation in the ROTC Simultaneous Membership Program (SMP). If a Soldier receives an ROTCS under 10 USC 2107a, then he or she may still be eligible for the MGIB–SR. ARNG cadets should contact their state or territory ESO to determine continued eligibility. Individuals receiving a scholarship under 10 USC 2107a agree to serve as officers in either the USAR or ARNG.

g. Is a Service academy graduate who does not receive a commission.

h. Is not serving on full-time active duty or full-time National Guard duty (FTNGD) 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.

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

3–5. Restrictions

A Soldier is not eligible if he or she—

a. Elects to use the MGIB–AD 2x4 Program, where total service in the SELRES is credited toward establishment of eligibility under the MGIB–AD 2x4 Program. 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.

b. Is an unsatisfactory participant.

c. Is receiving a SROTC program scholarship, under 10 USC 2107. Individuals receiving this type of ROTCS agree to serve as officers on active duty in the Army, Navy, Air Force, or Marine Corps.

d. Is a Service academy graduate who receives a commission.

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. A Soldier is authorized one period of absence and may either transfer within his or her military Service to the IRR, the inactive National Guard (ING), or the Standby Reserve or may transfer to the SELRES of another RC. Entitlement will be restored when the Servicemember reaffiliates in the SELRES 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. The period of absence will not be counted toward the required 6 years.

b. The Servicemember with a date of MGIB–SR basic entitlement after 28 November 1989 and before 30 June 2008 enters either active duty or FTNGD as an AGR member in accordance with DoDI 1215.06. Entitlement will be restored provided the Servicemember commits within 1 year of REFRAD or FTNGD as an AGR to serve in the SELRES for a period that, with time already served for entitlement of the Servicemember to MGIB–SR education entitlements benefits in accordance with this instruction, must be equal to or greater than 6 years.

c. The Servicemember serving on active duty or FTNGD in an AGR status.

3–7. Required statement of understanding

On assignment to the SELRES, each Soldier will—

a. Complete DA Form 5435 (Statement of Understanding–The Selected Reserve Montgomery GI Bill (10 USC Chapter 1606)). The CNGB; CAR; CG, USAREC; CG, HRC (AHRC–PDP–E) (for IMA Soldiers only); commanders of area commands and Joint Force Headquarters; and commanders of ACOMs, ASCCs, and DRUs 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.

b. Upload the completed DA Form 5435 into iPERMS and AMHRR.

(1) For IMA Soldiers, a copy will be sent directly to Commander, U.S. Army Human Resource Command (AHRC–PDP–E), Department 480, 1600 Spearhead Division Avenue, Fort Knox, KY 40122–5401. For TPU members, forward additional questions through channels to Commander, U.S. Army Reserve G–1 (AFRC–PRT–R), 4700 Knox Street, Fort Liberty, NC 28310–5010.

(2) For ARNG Soldiers, a copy will be uploaded to the Soldier’s iPERMS record. Forward additional questions through channels to Chief, National Guard Bureau (Education Branch), 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 as follows:

(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.

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 (non-AGR) 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 4187 will be filed in the Soldier’s AMHRR along with DD Form 2384–1 and 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 through 3–4i, 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 no longer use DD Form 2384–1 as an official document for MGIB–SR. Instead, the USAR Soldier should apply to DVA for a certificate of eligibility when they wish to use the MGIB–SR program.

b. USAR MGIB–SR program administration and data reporting for USAR Soldiers not assigned to a TPU (for example, IMA Soldiers) is the responsibility of HRC. USAR IMA Soldiers will not be issued a DD Form 2384–1 but, instead, will need to apply to DVA for a certificate of eligibility when they wish to use the MGIB–SR program.

c. ARNG Soldiers will be furnished a DD Form 2384–1 via GIMS. Copies of the DD Form 2384–1 will be distributed as follows:

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

(2) A copy will be inserted in the Soldier’s AMHRR.

d. ARNG enrollment, to include issuance of the DD Form 2384–1, will be accomplished between the ARNG Soldier and their personnel management officer (PMO) and state incentives manager (SIM) 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 the application to the DVA.

(2) A copy will be inserted in the Soldier’s AMHRR.

3–10. Educational assistance

a. The DVA provides educational assistance under the MGIB–SR to an eligible Soldier pursuing a program of education approved by the DVA. A program of education may include 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 an HQDA memorandum on an annual basis.

c. The maximum benefit period is 36 months based on full-time student status, 48 months based on 3/4-time status, 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 in this paragraph 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.

a. Basic educational assistance entitlement for service on active duty under 38 USC Chapter 30.

b. Educational assistance for personnel enlisting for active duty under 10 USC Chapter 107.

c. Basic educational assistance entitlement for service in the SELRES under 38 USC Chapter 30.

d. Post-9/11 GI Bill under 38 USC Chapter 33.

3–12. Individual application procedures

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

a. Obtain a DD Form 2384–1.

b. Select a school or program.

(1) Obtain information about approved programs. Information is available on the DVA website <https://www.benefits.va.gov/gibill/>.

(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.

(1) Complete VA Form 22–1990.

(2) Send VA Form 22–1990 and 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. Termination of entitlement

Entitlement to educational assistance under the MGIB–SR ceases if an enrolled Soldier—

a. Is declared an unsatisfactory participant per AR 135–91. For Soldiers assigned to a TPU, the termination date entered into personnel data reporting systems must be the date the Soldier attained their ninth 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 annual training (see AR 135–91 for conditions of unexcused absences).

b. Is discharged or separated from the SELRES except as follows:

(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:

(a) Soldiers who established eligibility between 1 July 1985 and 30 September 1992 will retain eligibility until the end of their original 10-year eligibility period per paragraph 3–14a.

(b) Soldiers who established eligibility between 1 October 1992 and 29 June 2008 will retain eligibility until the end of their original 14-year eligibility period per paragraph 3–14b.

(c) Soldiers who established eligibility after 29 June 2008 will retain eligibility for a 14-year period after separation from the SELRES (see DoDI 1322.17).

(4) When ordered to active duty without his or her 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 redesignation 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, 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 his or her 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 extended active duty, or for the purpose of immediate appointment or enlistment in an Active Component (AC) 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 that 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. Receives financial assistance under an ROTCS per 10 USC 2107.
- d. 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.
- e. Is activated under 10 USC 12301(a), 10 USC 12301(d), 10 USC 12301(g), 10 USC 12302, or 10 USC 12304. In this case, the DVA will extend the entitlement period by the length of the active duty service plus 4 additional months. The Soldier will receive a separate extension for each active duty call-up. This extension will be given regardless of whether or not the Soldier stayed in the SELRES. The law does not permit the DVA to extend eligibility for call-ups under 32 USC.
- f. Is transferred to the IRR or ING for personal reasons for a period exceeding 12 months.
- g. Is transferred to the IRR or ING to complete a religious missionary obligation for a period exceeding 36 months.
- h. Transferred to the IRR or ING more than once. Terminate on start date of entering IRR/ING for the second time.

3–14. Period of entitlement (delimiting period)

- a. Soldiers who contracted for MGIB–SR entitlement prior to 30 September 1992 have a 10-year period from the basic entitlement date in which to use benefits under MGIB–SR.
- b. Soldiers who contracted for MGIB–SR entitlement between 1 October 1992 and 30 June 2008 have a 14-year period (delimiting period) from the basic entitlement date in which to use benefits under MGIB–SR.

c. Soldiers who contracted for MGIB–SR after 29 June 2008 are eligible to use benefits under MGIB–SR only while they are serving in the SELRES.

d. Soldiers may receive benefits until the delimiting period ends or they exhaust their entitlement, whichever comes first, except that:

(1) 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 delimiting period, within 1 year after the last day of the 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.

(2) If the Soldier is activated under 10 USC 12301(a), 10 USC 12301 (d), or 10 USC 12301 (g), 10 USC 12302, or 10 USC 12304, the DVA will extend the eligibility period by the length of the active duty service plus 4 additional months. The Soldier will receive a separate extension for each active duty call-up. This extension will be given regardless of whether or not the Soldier stayed in the SELRES. The law does not permit the DVA to extend eligibility for call-ups under 32 USC.

(3) If the Soldier's eligibility expires during a period of enrollment in training, the DVA may extend eligibility to the end of a term, quarter, or semester. If the school does not operate on a term basis, the DVA may extend eligibility for up to 12 weeks.

3–15. Reaffiliation in the Selected Reserve

a. Upon reaffiliation, 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 reaffiliates 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 a religious 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 reasons outlined in paragraph 3–15d or 3–15e may regain eligibility for educational assistance provided reaffiliation 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 reaffiliate. A voluntary separation or reassignment must be authorized by appropriate regulations (see para 3–15b).

d. When a Soldier is ordered to active duty without his or her consent during a period of war or national emergency and loses SELRES status as a result, reaffiliation within 90 days of release from such period of active duty will allow the Soldier to regain eligibility for educational assistance under this chapter. SELRES Soldiers who are ordered to active duty pursuant to Presidential Reserve call-up under 10 USC 12304 or under other circumstances not requiring their inclusion in the Regular Army end strength do not lose their status as members of the SELRES during the period of such active duty, unless otherwise transferred from the SELRES. TPU/IMA Soldiers transferred to the IRR during active duty mobilization are ineligible for MGIB–SR and may regain eligibility upon return to SELRES as stated previously.

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

3–16. Recoupment

Soldiers who receive educational assistance payments and lose entitlement due to unsatisfactory participation or failure to reaffiliate 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. The recoupment is based on a formula prescribed by the DoD and the DVA.

Note. Soldiers should consider reaffiliation in the SELRES to avoid being processed for recoupment.

3-17. 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. To ensure the Soldier understands the incentive to be contracted for and received, he or she should be advised that incentives offered are subject to change. 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.

3-18. Montgomery GI Bill-Selected Reserve and the mobilized Soldier

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

b. In accordance with established DVA policy and procedures, the DVA automatically extends the delimiting period for use of MGIB-SR benefits to those Soldiers ordered to active duty 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-Selected Reserve Kicker

3-19. General

This chapter provides policy for the administration of the Educational Assistance Allowance Increase, commonly called the "MGIB-SR Kicker," for members of the SELRES. Army RC participation, amount, MOS, and/or skill eligibility is announced each FY in the Voluntary Education (VolEd) Policy memo. The link to VolEd policy is <https://gko.portal.ng.mil/> (common access card required.)

3-20. 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.

3-21. Scope

A Servicemember 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 the 6-year contract under the Kicker program, unless an exception is authorized by the designated SECARMY representative.

3-22. Eligibility

To qualify for the MGIB-SR Kicker, SELRES members must meet 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 MGIB-SR or MGIB-AD.
- (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) For NPS applicants, have completed IADT, including the Alternate Split Training Program option, when applicable.

- (6) For PS applicants, possess an 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).
- (10) For ARNG, complete NGB Form 5435 (Montgomery GI Bill Kicker Incentive Addendum (ARNG)).
- (11) Not be receiving an Army ROTCS under 10 USC 2107.
 - b. Officers must—
 - (1) Be an officer within the first one year of commissioning or be a lieutenant without a baccalaureate degree.
 - (2) Complete 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 MGIB–SR or MGIB–AD.
 - (a) For USAR, complete DA Form 5435–1.
 - (b) For ARNG, complete NGB Form 5435.
 - c. An officer candidate or WO candidate.
 - (1) 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.
 - (2) When contracting as a candidate for the Kicker, may continue receipt of the Kicker after accepting the oath of office.
 - (3) For ARNG, must complete NGB Form 5435–1 (Montgomery GI Bill Kicker Incentive Addendum Supplemental (ARNG)).
 - d. SROTC and/or SMP cadets must—
 - (1) First complete IADT to qualify for MGIB–SR. 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.

- (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 5435–1.
 - (b) For ARNG, complete NGB Form 5435.
- (3) In order for a cadet to be eligible for the ROTC/SMP Kicker, first be eligible for the MGIB–SR basic benefit. Cadets who enlist as an NPS applicant at a MEPS as a SMP cadet are not eligible for MGIB–SR.
- (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.

3–23. Entitlement

- a. MGIB–SR Kicker incentive payments will not exceed a maximum of 36 academic months based on full-time educational assistance. A Servicemember can only receive the Kicker for the number of months of basic eligibility remaining. For 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 remains 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 SELRES, 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, the Servicemember must—

- (1) 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) Return by the end of the authorized period of nonavailability.
- (3) Extend their term of service for the period of nonavailability to complete the total 6-year obligation.
- (4) Be formally counseled concerning the disposition of his or her incentive.

3–24. 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, 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 IRR in the USAR or the 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 reaffiliation process to another RC.

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.

3–25. 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–SR 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.
- (3) Soldier enters the AGR or Military Technician Program where membership is required for full-time employment.

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, ARNG for ARNGUS members, if directed by the CNGB.

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 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 reaffiliation 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.

3-26. Termination

Termination of MGIB-SR Kicker incentive will occur should a Servicemember be terminated prior to the fulfillment of his or her 6-year contractual agreement and obligation. Full procedures are outlined in AR 601-210. Termination includes, but is not limited to:

a. Unsatisfactory participation (the date the Soldier attained their ninth unexcused absence, per AR 135-91).

b. Transferring to the USAR Control Group (ROTC) for the purpose of accepting an active duty 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.

3-27. 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 refers 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. The CNGB and the CAR are 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) DFAS determines the amount of recoupment.

(2) Calculated overpayment will be recouped.

(3) Calculated underpayment will be paid to the Servicemember.

(4) 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.

3-28. Funding requirements

a. Funding is determined as follows:

(1) The RC concerned calculates 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 is 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 are as follows:
- (1) The RC reports MGIB–SR Kicker activity by monthly transmission to DMDC.
 - (2) The Director, DMDC consolidates data from the RC and pass eligibility information to DVA by the best means available.

3–29. Inquiries and comments

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

b. For ARNG Soldiers, send inquiries to the respective state or territory Education Services Office. Forward additional inquiries through channels to Chief, National Guard Bureau (ARNG–HRM–E), 111 South George Mason Drive, Arlington, VA 22204–1382.

Chapter 4 Post-9/11 GI Bill

4–1. Authority

PL 110–252 established the Post-9/11 GI Bill under 38 USC Chapter 33. The law has been amended over the years by PL 111–32, PL 111–377, PL 112–26, PL 113–146, PL 115–48, PL 115–62, and PL 116–35. Additionally, reference Part 21, Title 35, Code of Federal Regulations (38 CFR 21), Subpart P. Higher policy is established by DoDI 1341.13 and DTM 18–006.

4–2. Objective

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

4–3. Soldier eligibility

For the purposes of this policy, the terms “Armed Services” and “Uniformed Services” do 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 active duty in Regular status or on active duty on specific Title 10 or Title 32 orders 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. Specific eligibility criteria are listed in 38 USC 3301. Additionally, PL 115–48 makes Soldiers who are awarded a Purple Heart eligible for Post-9/11 GI Bill benefits.

4–4. Soldier eligibility exclusions

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

- a.* Active duty service completed on or before 10 September 2001.
- b.* The 5-year active duty 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 active duty service regardless of any other ADSO that the officer may have incurred due to other incentives.
- c.* The 4-year ADSO for a ROTC scholarship under 10 USC 2107(b). For purposes of attaining Post-9/11 GI Bill eligibility, this 4-year ADSO is the first 4 years of service in the AC regardless of any other ADSO that the officer may have incurred due to other incentives. The 3-year ADSO for nonscholarship ROTC commissions, OCS, and direct commission officers is qualifying active duty service for determining Post-9/11 GI Bill eligibility. Qualifying Post-9/11 service during an ADSO is not excluded.
- d.* The 3-year ADSO associated with acceptance of the active duty Regular Army LRP incentive (see Title 10 USC Chapter 109). For purposes of Post-9/11 GI Bill qualifying active duty service, the ADSO associated with Regular Army LRP is the first 3 years of active duty service regardless of the length of the initial service obligation. For example, a Soldier enlists for 5 years and receives LRP. 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.* Service as a cadet or midshipmen in one of the Service Academies.

- f. Active duty for initial entry training, unless the Soldier has completed at least 24 months of other qualifying service.
- g. Service that was terminated because a Soldier was a minor, was erroneously enlisted, or received a defective enlistment agreement.
- h. A period of SELRES service used to establish eligibility under 10 USC Chapter 1606 (MGIB–SR) or under 10 USC Chapter 1607 (Reserve Education Assistance Program (REAP)).
- i. A period of SELRES service used to establish eligibility for entitlements under 38 USC Chapter 30.
- j. Annual training conducted under authority of 10 USC 10147 or 10 USC 12301(b).
- k. For purposes of Post-9/11 GI Bill, service in the IRR in a nonactive duty 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

- a. As a general rule, eligible Soldier entitlements expire based on one of the following:
 - (1) If the Soldier’s last date of discharge or REFRAD of at least 90 consecutive days of qualifying Post-9/11 GI Bill service was completed prior to 1 January 2013, entitlements expire at the end of a 15-year period beginning on the date of discharge; or
 - (2) If the Soldier’s last date of discharge or REFRAD of at least 90 consecutive days of qualifying Post-9/11 GI Bill service was completed on or after 1 January 2013, entitlements never expire.
- b. 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 determined by a Soldier’s aggregate qualifying length of active duty service found in 38 CFR 21.9640. Benefits may include:
 - (1) Amount of tuition and fees charged, not to exceed the most expensive in-state 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 where the student is physically attending the majority of classes (paid to the veteran). This stipend is not payable to Soldiers and/or their spouses who use transferred Post-9/11 GI Bill benefits while the Soldier is on active duty.
 - (3) Yearly books and supplies stipend of up to \$1,000 per year (paid to the veteran). Also, this stipend is payable to Soldiers who use Post-9/11 GI Bill benefits while on active duty.
 - (4) A one-time payment of \$500 may be payable to certain veterans relocating from highly rural areas to attend school. Payment of this benefit is expected to be highly unusual. The DVA makes this determination.
- b. Post-9/11 GI Bill Kickers, for those who are eligible, will be paid to the veteran.
- c. Veterans attending solely by distance learning on more than a half-time basis are authorized a monthly stipend equal to 50 percent of the national average basic allowance for housing rate for an E–5 with dependents. Veterans enrolled at half-time or less are eligible for an appropriately reduced stipend for books and supplies. The DVA may authorize payment of the full monthly stipend allowance if the veteran 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. This stipend is not payable to Soldiers and their spouses who use Post-9/11 GI Bill benefits while the Soldier is on active duty or spouses of active duty Soldiers using transferred benefits while the sponsoring Soldier is on active duty.
- d. Post-9/11 GI Bill benefits are subject to change based on action by Congress. Benefit payment amounts vary depending upon one’s rate of attendance (for example, full-time or half-time). Payment amounts are determined by the DVA and are available on the DVA website <https://www.benefits.va.gov/gibill/>.
- e. Post-9/11 GI Bill benefits may be used for an approved program of education offered by an institution of higher learning as those terms are defined in 38 USC 3452(b) and 38 USC 3452(f) and are 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, correspondence training, cooperative training, entrepreneurship training, flight training, independent training, distance learning training, licensing and certification reimbursement, national testing

reimbursement, on-the-job training, tuition assistance Top-Up, tutorial assistance, and noncollege degree programs. The 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 such programs are specifically 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 active duty.

a. The amount of educational assistance payable will be the amount of tuition authorized for active duty. The DVA makes 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 active duty. The potential exists that the DVA will pay the full cost of tuition and fees, less any tuition assistance received, for the education program being pursued. Reference AR 621–5 for additional guidance the tuition assistance education benefit.

b. 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 tuition assistance Top-Up. 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 1 August 2009 meets the following:

(1) Is entitled to basic educational assistance under MGIB, MGIB–SR, REAP or EATP, as long as they have unused entitlement under that program.

(2) Soldiers with only one qualifying period of service on/after 1 August 2011 and who are eligible for Post-9/11 GI Bill and possibly MGIB–AD, MGIB–SR, and REAP are eligible to elect one GI Bill only.

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

(4) 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.

(5) Is entitled to basic educational assistance under VEAP. Eligibility for VEAP ended on 30 June 1985. Soldiers who have questions about VEAP benefits or eligibility should call 1–888–442–4551 to speak with a DVA Education Call center agent. VEAP-era Soldiers who did not open VEAP accounts may be eligible for benefits based on qualifying active duty 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, 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, EATP, MGIB–SR, REAP, Vocational Rehabilitation and Employment, VEAP, Survivors' and Dependents' Educational Assistance, or the provisions of the Hostage Relief Act of 1980 (see 38 USC 3033) 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. The Soldier is responsible for ensuring the installation finance office is aware of the Post-9/11 GI Bill election. The Soldier is also responsible for ensuring the finance office contacts DFAS to halt MGIB–AD reduction in pay.

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

a. Soldiers described in paragraph 4–8, whose pay was reduced due to enrollment in MGIB, and who fully exhausted their Post-9/11 GI Bill benefit may receive a refund of that pay reduction subject to the following:

(1) A full refund for Soldiers who used zero months of benefits under the MGIB.

(2) A partial refund for Soldiers who used a portion of months under the MGIB, calculated by the number of months of MGIB benefits used divided by 36.

b. The refund will be added to the monthly stipend allowance paid in the last month of eligibility under the Post-9/11 GI Bill only when the Soldier is the one who used the last day of the last month of the Post-9/11 GI Bill benefit. Refer to paragraph 4–6 for clarification of eligibility to receive the monthly stipend.

c. Veterans who do not exhaust entitlement under the Post-9/11 GI Bill will not receive a refund of the pay reduction.

d. The following is an example of such refund: A veteran who used 25 months of MGIB under 38 USC Chapter 30 converts to Post-9/11 under 38 USC Chapter 33. The veteran has 11 months of remaining benefits under Post-9/11. If the veteran 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

a. Soldiers who participated in the Buy-Up provision of MGIB and 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 Bill 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

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. For example, a Soldier uses 25 months of MGIB (38 USC Chapter 30) and converts to Post-9/11 GI Bill, so this Soldier has only 11 months of remaining benefits of Post-9/11 GI Bill benefits. The DVA has one exception to this rule: only when the Soldier has used all 36 months of MGIB benefits on the date of conversion will the DVA allow that Soldier to have 12 months 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 described in paragraph 4–6, 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 monthly and will be prorated based upon the monthly Kicker value that existed at the time of election. The VEAP (38 USC Chapter 32) Kicker does not convert to the Post-9/11 GI Bill, so a Soldier or their dependent using the Post-9/11 GI Bill will not receive the VEAP Kicker payment.

4-15. Transferability of unused benefits to dependents

Soldiers may elect to transfer their Post-9/11 GI Bill education benefits to their spouse, one or more of their children, or a combination of spouse and children through the TEB website in the milConnect portal at <https://milconnect.dmdc.osd.mil/milconnect/>. Only dependents listed as eligible in the TEB website may receive the Post-9/11 GI Bill education benefit. TEB is neither an entitlement nor a transition benefit, but was specifically identified by statute (PL 110-252) as a tool for recruitment and retention of the career force. The ability to transfer the Post-9/11 GI Bill education benefit was created to promote recruitment and retention of members of the Armed Forces.

a. Eligibility to transfer unused benefits. Soldiers currently in active duty or SELRES status on/after 31 August 2018 and with a Purple Heart may transfer unused Post-9/11 GI Bill education benefits to their eligible dependents regardless of years of service, any suspension of favorable personnel actions, and are not required to commit to 4 years from the TEB request date. Soldiers on active duty or in SELRES status on or after 31 August 2018 who submitted TEB requests on or after 1 August 2009 and have a Purple Heart (regardless of Purple Heart effective date) will have their TEB requests reviewed for eligibility. Soldiers currently in active duty or SELRES status on or after 1 August 2009 with no Purple Heart must meet all of the following criteria to transfer unused Post-9/11 GI Bill education benefits to their eligible dependents:

(1) Soldiers must be eligible for Post-9/11 GI Bill benefits and not be serving under a suspension of favorable personnel actions in accordance with AR 600-8-2 at the time of the Soldier's request to transfer education benefits. A flag is an action that would prevent a Soldier from being promoted or retained in the Service, including failure to maintain height, weight, or physical fitness standards.

(2) Soldiers must have at least 6 years of eligible service (qualifying active duty or SELRES) in the Armed Forces on the date of election and agree to serve 4 additional years from the date of request, regardless of the number of months transferred. Soldiers who are not eligible to commit to 4 additional years of service from the TEB request date are not eligible to transfer benefits.

(3) Soldiers with at least 6 years of eligible service who have not applied for TEB, who are on limited duty or involved in a Medical Evaluation Board (MEB), Physical Evaluation Board (PEB), or Disability Evaluation System process must wait until the process is complete before applying for TEB. If found fit for duty, the Soldier will comply with the standard TEB application procedure. The following rules apply:

(a) Soldiers who applied for TEB, but were denied due to insufficient retainability as a result of being on limited duty or being involved in an MEB, PEB, or Disability Evaluation System process and are later cleared to reenlist, must request transferability again once they are found fit for duty and commit to an additional 4-year service obligation.

(b) Soldiers who have been approved for TEB and are subsequently enrolled into MEB, PEB, or the Disability Evaluation System process and are found fit for duty may keep their TEB and fulfill their currently approved TEB obligation date.

(c) Soldiers who have been approved for TEB and are subsequently enrolled into an MEB, PEB, or Disability Evaluation System process and are found unfit for continued service will retain TEB and will not be subject to recoupment by DVA.

(4) Soldiers who complete their TEB service obligation and subsequently receive a less-than-honorable discharge will retain TEB and will not be subject to recoupment by DVA. This paragraph does not apply to confined Soldiers or those who have lost time in nonpaid or nonleave accrual status that does not count toward fulfillment of the TEB service obligation.

(5) For the purposes of TEB, time credited toward a TEB service obligation includes active duty in an active branch of service, service in the SELRES, or service in the IRR while on Post-9/11 qualifying active duty. It does not include those who are retired, discharged, or released from the Armed Forces, assigned to the IRR and not on active duty, assigned to the ING, or lost time (including "nonpay and nonleave accrual status" listed on DD Form 214). Soldiers are not restricted to a specific component or component

status solely because of a TEB service agreement. The Soldier must not have a break in service or must not be placed in the IRR in an inactive status when transitioning between Army components and/or categories. It is the Soldier's responsibility to provide documentation to their separation authority showing acceptance in another Army component and component status where the Soldier will fulfill the balance of the TEB service obligation. It is the Soldier's responsibility to confirm with the gaining Army component and category about fulfilling their existing TEB service obligation in the new component and/or category.

(6) Historical note. TEB requests submitted before 1 August 2013 allowed for a 0, 1, 2, or 3-year service obligation for Soldiers who became retirement eligible during the period from 1 August 2009 to 1 August 2013 and had agreed to serve the required ADSO period. For the purposes of this paragraph, a Soldier is considered retirement eligible if he or she completed 20 years of active federal service or 20 qualifying years as computed under title 10 USC 12732. For this paragraph, use whichever computation establishes 20 years regardless of which component the Soldier was in at the time of electing to transfer their benefits.

(a) Soldiers eligible for retirement on or before 1 August 2009 incurred no required ADSO.

(b) Soldiers with an approved retirement date effective on or after 1 September 2009, but on or before 1 July 2010 incurred no required ADSO.

(c) Soldiers who attained 20 years of service on or after 2 August 2009 but before 2 August 2010 incurred a 1-year ADSO from the date of TEB request.

(d) Soldiers who attained 20 years of service on or after 2 August 2010 but before 2 August 2011 incurred a 2-year ADSO from the date of TEB request.

(e) Soldiers who attained 20 years of service on or after 2 August 2011 but before 2 August 2012 incurred a 3-year ADSO from the date of TEB request.

(f) Paragraph 4–15a(6) does not apply to any Soldier who retired on or before 1 August 2009 unless recalled to active duty and served on or after 1 August 2009 but before 2 August 2013. Those who retired 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 was 31 July 2009, which meant they would have transferred to the retired list on 1 August 2009.

(g) Paragraph 4–15a(6) expired on 1 August 2013.

b. Soldiers not eligible to transfer unused benefits.

(1) Soldiers who retired 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 was 31 July 2009 (and transferred to the retired list on 1 August 2009) or earlier.

(2) Former Servicemembers who failed to request the TEB while on qualifying active duty or assigned to the SELRES.

(3) Soldiers who are unable to complete the required service agreement, including but not limited to:

(a) Soldiers released from the Armed Forces prior to completion of an agreed upon additional service agreement for performance, conduct, and/or potential for advancement reasons including, but not limited to separation under the provisions of the Qualitative Management Program.

(b) Soldiers refusing selective continuation when offered. Soldiers must accept and continue accepting continuation in order to fulfill the TEB service agreement or their dependents may be subject to a DVA recoupment as provided for in paragraph 4–15c.

(4) On or after 26 October 2017, Soldiers who submit TEB requests on or after the convening date for the respective separation board, such as the Qualitative Service Program, Qualitative Retention Board, Selective Early Retirement Board, Enhanced Selective Early Retirement Boards, Officer Separation Board, Selective Retention Board, or REFRAD Board.

(5) On or after 26 October 2017, Soldiers who submit TEB requests whose Uniformed Services University of Health Sciences service will not count toward calculating a Soldier's active federal service for purpose of Post-9/11 GI Bill eligibility, TEB eligibility, and TEB service obligation due to duplication of benefits.

(6) On or after 26 October 2017, Soldiers who submit TEB requests and are identified as a two-time nonselect for promotion at the time of the TEB request, or as Sanctuary at the time of the TEB request, will be rejected for TEB.

c. Overpayment and recoupment.

(1) Soldiers who fail to fulfill the TEB service obligation will have the previously approved TEB rejected and the Soldier and dependent may incur an overpayment debt from the DVA. Continuum and fulfillment

of service (as defined in para 4–15a(5)) counts as time toward the TEB service agreement and will negate such indebtedness. Soldiers must be qualified and be accepted for continued service.

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

d. Authorized exceptions for failure to complete transfer of education benefits service agreement. If a Soldier fails to complete the service agreement for reasons other than those listed below, the amount of any transferred entitlement used by the dependent will be treated as an overpayment of educational assistance and will be subject to the recouping by the DVA. Exceptions are as follows:

(1) Death of the Soldier.

(2) Discharge or release from the Army for a medical condition that pre-existed the service of the Soldier and was not service-connected.

(3) Discharge or release from the Army for hardship.

(4) Discharge or release from the Army for a physical or a mental condition not characterized as a disability and which did not result from the Soldier's own willful misconduct, but did interfere with the performance of duty. For Regular Army Soldiers, the DD Form 214 must reflect "Condition, Not A Disability" as the reason for discharge. For ARNG Soldiers, the NGB Form 22 (National Guard Report of Separation and Record of Service) must reflect "Medical" as the reason for discharge. For USAR Soldiers, the USAR order must reflect "Medical Disqualification."

(5) Discharge or release from the Army for a disability. For Regular Army Soldiers, the DD Form 214 must reflect "Disability" as the reason for discharge. For ARNG Soldiers, the NGB Form 22 must reflect "Disability" as the reason for discharge. For USAR Soldiers, the USAR order must reflect "Disability."

(6) Involuntary discharge or release through a Service force-shaping or RIF initiative when the TEB request resulting in an approved TEB request is before the convening date of the following boards:

(a) Service force-shaping or RIF initiatives include but are not limited to Soldiers involuntarily separated or retired from qualifying service under the provisions of the Qualitative Service Program, Qualitative Retention Board, Selective Early Retirement Board, Enhanced Selective Early Retirement Boards, Officer Separation Board, Selective Retention Board, or REFRAD Board. Programs and boards supporting such discharges will be announced by the DCS, G–1. Soldiers separated under the above programs may only retain the transferred benefits without completing the previously approved TEB service obligation if they requested the transfer prior to the convening of the board, on or after the effective date of this regulation, and were otherwise eligible to transfer benefits (all factors must be met). Soldiers must make a request for TEB prior to the board convening date for involuntary separation due to a force-shaping or RIF board.

(b) These exceptions do not apply to Soldiers who voluntarily retire or separate in lieu of consideration by any separation or retirement board and will result in TEB rejection if their established separation/retirement date is before the TEB obligation end date. If their dependents used TEB, the Soldier and dependent will incur a TEB overpayment or debt. 38 USC 3319(i) specifies that both the transferor and the dependent have joint and several liability for the debt. The DVA establishes the debt and enforcing liability.

(7) Soldiers with a previously approved TEB who are subsequently reclassified in the special reporting code 09U and involuntarily separated from the Army on the 09U adjusted retention control point date prior to completing their 4-year service agreement.

(8) Soldiers on active duty or in SELRES status on or after 31 August 2018 who submitted TEB requests on/after 1 August 2009 and have a Purple Heart (regardless of effective date of award).

(9) Soldiers with a previously approved TEB before being identified as a two-time nonselect for promotion and who are subsequently discharged or released from active duty or in SELRES status, with an Honorable discharge, due to twice failing to be selected for promotion as a commissioned officer on active duty or in SELRES status and accept selective continuation (if offered).

(a) Officer not offered selective continuation will have the TEB obligation end date adjusted to his or her separation or retirement date (if officer has not already fulfilled TEB obligation end date of 4 years).

(b) Officer offered selective continuation who accepts selective continuation will have the TEB obligation end date adjusted to his or her new selective continuation separation or retirement date (if officer has not already fulfilled TEB obligation end date of 4 years).

(c) Officer offered selective continuation but who rejects selective continuation will have the TEB rejected (if officer has not already fulfilled TEB obligation of 4 years) or does not directly affiliate into the SELRES to complete TEB obligation, and has no break in service between active duty and SELRES. The

amount of any transferred entitlement that is used as of the date of such failure must be treated as an overpayment of educational assistance and will be subject to collection by DVA.

(10) Soldiers with a previously approved TEB who failed to be selected for promotion as an enlisted Soldier and were separated under retention control point policies (or a change in these policies) will retain TEB unless separated at retention control point due to a subsequent reduction in rank through nonjudicial punishment or court-martial.

(a) Soldiers at retention control point mandatory separation/retirement date adjustment due to Army mandated change (not due to fault of Soldier) will have the TEB obligation end date adjusted to the new retention control point or mandatory retirement date.

(b) Soldiers with retention control point or mandatory retirement date adjustment due to fault of the Soldier (for example, demotion, court-martial) will not have the TEB obligation end date adjusted to the new retention control point or mandatory retirement date. The amount of any transferred entitlement that is used must be treated as an overpayment of educational assistance and will be subject to collection by DVA.

e. Procedures to transfer Post-9/11 GI Bill education benefits to dependents.

(1) *General.* Soldiers must use the TEB website in the milConnect portal at <https://www.dmdc.osd.mil/milconnect> or <https://milconnect.dmdc.osd.mil/milconnect/> to request, modify, or revoke transferred benefits. Dependents must be enrolled in the Defense Enrollment Eligibility Reporting System (DEERS) and reflect as eligible in the TEB website at the time of transfer in order to receive TEB.

(2) *Initial election for transfer of education benefits.* Soldiers may only request to transfer Post-9/11 GI Bill education benefits while serving as a member of the Uniformed Services on active duty (includes IRR on active duty if service obligation can be met) or SELRES and otherwise eligible for TEB. Soldiers may not request transfer while assigned to the IRR and not on active duty; ING; in retired, separated, and/or discharged status; or in Retiree Recall status. IRR status precludes the Soldier from transfer unless the Soldier is IRR on active duty. RC Soldiers must be in an active status (drilling and receiving or waiving pay) to transfer. Soldiers who are separated or inactive may not transfer.

(a) By electing to transfer benefits, Soldiers agree to serve the TEB service agreement as outlined in paragraph 4–15a. Enlisted Soldiers will reenlist or extend in order to meet the service agreement before the TEB is processed and approved.

(b) In order to reallocate any additional months to a dependent after discharge, release, or retirement, Soldiers must have transferred at least 1 month to that dependent prior to leaving the Armed Forces. The number of months of benefits transferred by a Soldier may not exceed the lesser of 36 months or the amount of unused benefits remaining as determined by the DVA. All requests to modify or revoke transfer of benefits after separation from service will be accomplished through the TEB milConnect website.

(3) *Approval of transfer of education benefits.* Prior to approving requests to transfer educational benefits, Army certifying officials will verify that Soldiers requesting to transfer benefits are in compliance with the transferability policy provisions in paragraph 4–15a.

(a) Certifying officials will ensure that appropriate, available, and automated Army personnel systems are updated to show the 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 required additional service prior to certification in the TEB website.

(b) Soldiers are responsible for verifying the status of their request on the TEB website. The Soldier must notify the certifying official immediately if they do not intend to complete the entire service agreement.

(c) Once requests to transfer benefits are approved, Soldiers should retain a copy of the TEB approval form from the TEB website for their personal records.

(d) A TEB service obligation will begin on the date of the Soldier's request within the TEB website resulting in a TEB approval and will be served concurrently with any other additional service agreements in effect at the time of the transfer. Transfer of Post-9/11 GI Bill benefits will not, in and of itself, limit any other reenlistment option or incentive to which a Soldier may be eligible.

(e) Questions regarding approval of or reasons for disapproval of TEB requests should be directed to appropriate certifying officials, which are CG, HRC (for Regular Army and USAR Soldiers) at usarmy.knox.hrc.mbx.tagd-post911gibill@mail.mil and CNGB (for ARNG Soldiers) at arng.esc.ch33@mail.mil.

(4) *Changes to an approved transfer education benefits election.* Current Soldiers must use the TEB website to modify (increase or decrease to range of 1 to 36 months) or revoke (change to 0 months)

previously transferred benefits. After discharge, release, or retirement, veterans use the TEB website to modify or revoke the previously approved TEB.

(a) A Soldier does not need to submit a new TEB request or have the TEB service obligation changed if the Soldier adds dependents or changes months allocated to dependents before leaving service. New dependents are added through the process outlined in paragraph 4–15e. The addition of a new dependent does not require a new TEB request, but does require allocation of at least 1 month to the new dependent if the Soldier wants the dependent to be eligible for TEB. The TEB request must be modified while the Soldier is still in active duty or SELRES status.

(b) Soldiers may increase, decrease, or revoke months to an eligible dependent at any time as long as at least 1 month is transferred to the dependent before the Soldier leaves the Armed Forces. Once a Soldier leaves service, the Soldier may not transfer benefits to dependents who had not received at least 1 month while the Soldier was on active duty or in the SELRES. Dependents gained after a Soldier is no longer on active duty or in the SELRES may not receive TEB.

(c) Soldiers or veterans may modify any unused portion of benefits previously approved for transfer at any time. Soldiers or veterans may revoke all of the previously transferred months. Revoking benefits will not automatically remove any associated service agreement.

(d) See paragraph 4–15k for Soldiers wanting to revoke months from all dependents and removal of the TEB service obligation.

Note. A new dependent, as long as he or she is added to DEERS, can be transferred benefits without the “Begin Date” of the transfer being changed to the date of the addition (this is essential to prevent Soldiers from restarting the clock).

(5) *Dependent usage.* Information regarding use of TEB by eligible dependents and instructions for applying for use of benefits as a dependent are available at <https://www.benefits.va.gov/gibill/>.

f. *Prohibition on treatment of transfer of education benefits as marital property.* Entitlement transferred under this section may not be treated as marital property or the asset of a marital estate subject to division in a divorce or other civil proceedings per PL 110–252 and 38 USC 3319(f)(3).

g. *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) Effective on or after 5 January 2021, Soldiers can transfer to wards and foster children. Wards and foster children must reside with the Soldier for at least 12 months (by court order) and be in DEERS.

(d) A combination of the paragraphs 4–15g(1)(a) through 4–15g(1)(c).

(2) A Soldier must have enrolled a Family member in DEERS and must confirm eligibility 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 and expires up to reaching their 26th birthday only if the child is enrolled as a full-time student and unmarried (verified by DEERS). A child may be eligible if attending a DVA-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 TEB approving official in such cases. A Soldier must transfer at least 1 month to the eligible child before the child’s 23rd birthday for the child to be eligible for TEB.

(a) A child’s marriage after transfer of benefits was previously 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 a Soldier 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. Soldiers should not rely on divorce or other orders to modify their TEB election; such modifications must be done through the TEB website.

h. *Months of transfers.* 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.

i. *Transferee usage.* Prior to using transferred benefits, dependents need to follow the procedures referenced in Volume 78, Federal Register, p. 34254 (78 FR 34254), which state that for transferee usage, “[P]olicies and procedures for family member use of Post-9/11 GI Bill transferred educational benefits are

the responsibility of the DVA.” Policies and procedures are codified in 38 CFR 21 and presented and updated at <https://benefits.va.gov/gibill/>. 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) Is subject to the same eligibility period 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 after meeting the requirements of a secondary school diploma (or equivalency certificate) or reaching 18 years of age.

(c) May not use the benefit after reaching 26 years of age.

j. 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 active duty. The Soldier owns the benefit, and the Soldier’s entitlement is charged for dependent use (see 38 USC 3319(h)(1)). The Soldier and dependent using the benefit are jointly liable for any recoupment (see 38 USC 3319(i)).

k. Transfer of education benefits revocation process and removal of transfer of education benefits service obligation only for Soldiers separating, retiring, and unqualified resignation before fulfilling the service obligation. This policy is applicable to all Soldiers, regardless of Army component (that is, Regular Army, ARNG, or USAR). A Soldier may want to voluntarily retire, separate, or unqualified resignation (UQR) before the approved TEB service obligation. The Soldier must follow the below steps to have the TEB status changed from approved to rejected status, and have the TEB service obligation (identified as the TEB Obligation End Date in the TEB milConnect website) removed. Two different processes exist for Soldiers if their dependents have or have not used TEB.

(1) *Dependents have not used transfer of education benefits.* If the Soldier’s dependents have not used any benefit and the Soldier is submitting a request to voluntarily retire or separate (including UQR). The Soldier must follow the TEB revocation process before their TEB status can be moved from an approved to a rejected status and have their TEB obligation end date removed as follows:

(a) *Step 1.* The Soldier must revoke all benefits for each dependent on the TEB milConnect website at <https://milconnect.dmdc.osd.mil/milconnect/> by clicking on the “Revoke” box and the “Submit” box. Do not use the site’s drop-down menu box.

(b) *Step 2.* Soldiers must email the TEB certifying official that supports their particular component. Regular Army and USAR Soldiers send their TEB revocation email to the HRC EIB (phone 1–800–872–8272) at usarmy.knox.hrc.mbx.tagd-post911gibill@mail.mil. ARNG Soldiers send their TEB Revocation email to the ARNG ESC (phone 1–866–628–5999) at ng.robinson.ngb-arng-pec.mbx.arng-hrm-o-gi-bill@mail.mil. The email must contain the information outlined in table 4–1.

Table 4–1
Contents of revocation email—no benefits used by dependent

| | |
|----------------------------|---|
| Statement in body of email | “I have revoked the Post-9/11 GI Bill transfer of education benefits (TEB) for all dependents in the TEB webpage in the milConnect website. To my knowledge, my dependents have not used my Post-9/11 GI Bill education benefits. I request my TEB status be changed from an “approved” to a “rejected” status and remove my TEB service obligation. I understand changing my TEB status from an “approved” to a “rejected” status will result in only me being eligible to use my Post-9/11 GI Bill education benefits. If I am in error and my dependents have used TEB, I will revisit the TEB website to increase the number of months to the number used by my dependent(s) and provide the additional information as defined in AR 621–202 required by Soldiers whose dependents have used their Post-9/11 GI Bill benefits before the obligation status can be changed.” |
|----------------------------|---|

Table 4-1
Contents of revocation email—no benefits used by dependent—Continued

| | |
|-------------------------|---|
| Attachments to email | <p>For enlisted Soldiers, attach a copy of completed and signed DA Form 4187 (Personnel Action) for voluntary retirement/separation endorsed by the first O-6 commander/GS-15 supervisor or above in their chain of command.</p> <p>For officers and WOs, attach a copy of a retirement/UQR memorandum signed by the first O-6 commander/GS-15 supervisor or above in their chain of command.</p> |
| Identifying information | <p>Soldier must include full name, DoD identification number, mailing address, personal email, and a contact phone number at the end of the email as a signature block.</p> |

(c) *Step 3.* The TEB certifying official that supports the Soldier’s particular component (that is, Regular Army/USAR or ARNG) will verify with the DVA that the Soldier’s eligible dependents have not used the TEB Post-9/11 GI Bill and/or received TEB payment(s).

(d) *Step 4.* After the DVA confirms that the Soldier’s eligible dependents have not used the TEB Post-9/11 GI Bill and/or received TEB payment(s), the TEB certifying official that supports the Soldier’s particular component (that is, Regular Army/USAR or ARNG) will change the Soldier’s TEB status from an approved to a rejected status and remove the service obligation from the TEB website. The TEB certifying official will also remove the TEB service obligation from other applicable Army systems (for example, Total Officer Personnel Management and Information System (TOPMIS), Enlisted Distribution and Assignment System (EDAS), GIMS).

(e) *Step 5.* The TEB certifying official that supports the Soldier’s particular component (that is, Regular Army/USAR or ARNG) will respond to the Soldier’s email to notify him or her that the TEB rejection and service obligation removal actions are complete.

(f) *Step 6.* The Soldier will then need to forward a copy of the TEB certifying official’s email to his or her retirement, separation, or UQR processing official (only if the retirement, separation, or UQR official is awaiting documentation to reflect the removal of the Soldier’s TEB service obligation).

(2) *Dependents have used transfer of education benefits.* If dependents have used the benefit and the Soldier is submitting a request to voluntarily retire or separate (including UQR), the Soldier must follow the TEB revocation process before TEB status can be moved from an approved to a rejected status and have the TEB obligation end date removed:

(a) *Step 1.* If a Soldier’s dependents have used the benefit, they must return to the TEB milConnect website at <https://milconnect.dmdc.osd.mil/milconnect/> and restore the used months to the appropriate dependent(s).

(b) *Step 2.* Soldiers must email the TEB certifying official that supports the Soldier’s particular component. Regular Army and USAR Soldiers send their TEB revocation email to the HRC EIB (phone 1-800-872-8272) at usarmy.knox.hrc.mbx.tagd-post911gibill@mail.mil. ARNG Soldiers send their TEB revocation email to the ARNG ESC (phone 1-866-628-5999) at ng.robinson.ngb-arng-pec.mbx.arng-hrm-o-gi-bill@mail.mil. The email must contain the information outlined in table 4-2.

Table 4-2
Contents of revocation email—benefits used by dependents

| | |
|----------------------------|--|
| Statement in body of email | <p>“I have revoked the Post-9/11 GI Bill transfer of education benefits (TEB) for all dependents in the TEB webpage in the milConnect website. I request my TEB status be changed from an “approved” to a “rejected” status and remove my TEB service obligation. I understand that changing my TEB status from an “approved” to a “rejected” status will result in only me being eligible to use my Post-9/11 GI Bill education benefits. I understand that my dependents will not be eligible to use TEB. I am aware that my dependent or I will be liable for all overpayments/debts incurred by the U.S. Department of Veterans Affairs and that Soldiers currently in this situation are incurring an average debt of \$38,000 (with a range of \$5,000 to \$200,000).”</p> |
|----------------------------|--|

Table 4–2
Contents of revocation email—benefits used by dependents—Continued

| | |
|-------------------------|--|
| Attachments to email | <p>Attach a memorandum for record signed by the Soldier stating, “I understand that I have earned the Post-9/11 GI Bill education benefit for my use because of my active duty service; however, the option to transfer it to my eligible dependent(s) is neither a reward for service nor a transition benefit, but a retention incentive that required me to commit to and then fulfill a TEB service obligation to the Army. By my own choice, I will not fulfill the required Post-9/11 GI Bill transfer of education benefits (TEB) service obligation by remaining in the Service until I reach the TEB obligation end date. As a result, I understand I and/or my dependent(s) will incur an overpayment/debt established by the U.S. Department of Veterans Affairs because my dependents have used my Post-9/11 GI Bill TEB and I have not completed my service obligation. Furthermore, I understand the overpayment/debt may be a large and burdensome amount, but I still elect to not fulfill the required TEB service obligation. I understand I previously acknowledged the TEB service obligation and overpayment/debt when I applied for TEB in the Defense Manpower Data Center (DMDC) milConnect TEB portal. I understand the TEB obligation end date is located on the DMDC milConnect TEB portal in the upper left-hand corner of the screen and on the TEB approval form. Regardless, I make this choice of my own volition and waive any right to claim this retention benefit in the future for my dependents or to claim relief for the overpayment/debt.”</p> <p>For enlisted Soldiers, attach a copy of completed and signed DA Form 4187 for voluntary retirement/separation endorsed by the first O–6 commander/GS–15 supervisor or above in their chain of command.</p> <p>For officers and WOs, attach a copy of a retirement/UQR memorandum signed by the first O–6 commander/GS–15 supervisor or above in their chain of command.</p> |
| Identifying information | <p>Soldier must include full name, DoD identification number, mailing address, personal email, and a contact phone number at the end of the email as a signature block.</p> |

(c) *Step 3.* The TEB certifying official that supports the Soldier’s particular component (that is, Regular Army/USAR or ARNG) will verify with the DVA that the Soldier’s eligible dependents have used the TEB Post-9/11 GI Bill and/or received TEB payment(s).

(d) *Step 4.* After the DVA confirms that the Soldier’s eligible dependents have used the TEB Post-9/11 GI Bill and/or received TEB payment(s), the TEB certifying official that supports the Soldier’s particular component (that is, Regular Army/USAR or ARNG) will change the Soldier’s TEB status from an approved to a rejected status and remove the service obligation from the TEB website. The TEB certifying official will also remove the TEB service obligation from other applicable Army systems (for example, TOPMIS, EDAS, GIMS).

(e) *Step 5.* The TEB certifying official that supports the Soldier’s particular component (that is, Regular Army/USAR or ARNG) will respond to the Soldier’s email to notify him or her that the TEB rejection and service obligation removal actions are complete.

(f) *Step 6.* The Soldier will then need to forward a copy of the TEB certifying official’s email to his or her retirement, separation, or UQR processing official (only if the retirement, separation, or UQR official is awaiting documentation to reflect the removal of the Soldier’s TEB service obligation).

(3) *Requests canceled due to needs of the Army.* If a Soldier’s request to separate, retire, or UQR is approved; TEB status is changed from approved to rejected; TEB service obligation removed; and the separation, retirement, or UQR is later canceled due to needs of the Army, the TEB status will revert to the approved status and the original TEB service obligation will be reinstated.

(4) *Voluntary retirement, separation, or unqualified resignation is extended.* If a Soldier’s request to remove the TEB service obligation due to voluntary retirement, separation, or UQR is approved, and the Soldier’s voluntary retirement, separation, or UQR is extended to a date after the TEB service obligation that had been removed, the Soldier may seek re-establishment of the previous TEB request and the TEB obligation end date so long as there has not been a break in service.

(5) *Other considerations.* Before revoking TEB, Soldiers may want to consider changing components (for example, Regular Army to ARNG/USAR, USAR to ARNG) to continue fulfilling their TEB service obligation in the new Army component. If Soldiers decide to change Services (for example, Army to Air Force or Marine Corps), they must first verify the gaining Service’s TEB policy. Regardless, this option will not require TEB revocation.

I. Soldier with an approved transfer of education benefits and later has a break in service of 1 or more days. If the Soldier has a break in service of 1 or more days, the TEB Status will change from approved to rejected and the Soldier must resubmit a new TEB request and the Soldier's TEB obligation end date will be determined from the new TEB request date.

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 a Kicker, 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 HQDA incentives messages issued by 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 the Regular Army 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 AC 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 active duty 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 housing 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 active duty.

Chapter 5 Regular Army Loan Repayment Program

5-1. Authority

a. 10 USC Chapter 109.

b. DoDI 1304.36.

c. LRP is an enlistment recruitment incentive that offers an alternative to the enlistment bonus to increase accessions.

d. LRP is an incentive used to recruit Soldiers into the Army Cyber Command Officer Direct Commissioning Program.

5-2. Eligibility

The Soldier must—

- a. Be an 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 enlistment AFQT score that meets recruitment requirements at time of entry on active duty.
- f. Enlist into a selected MOS and remain qualified in the selected MOS and/or program. The term of service that a Soldier enlists for is dictated by the parent MOS; however, the term of service will not be less than 3 years. Eligible Regular Army LRP MOSs are subject to change based on the recruiting environment. Refer to DCS, G-1 messages for MOS changes.
- g. Be selected for the Army Cyber Command Officer Direct Commissioning Program. The term of service for Soldiers recruited into this program is set by U.S. Army Cyber Command; however, the term of service will not be less than 3 years.
- h. Disenroll from the MGIB using DD Form 2366.
- i. Receive a loan that was made, insured, or guaranteed under Title IV, Part B, D, or E of 20 USC 1001 et seq. (also known as the Higher Education Act of 1965) before entering active duty. The loan must not be in default and must remain in good standing while on active duty. Loans qualifying for repayment are as follows:
 - (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 the Soldier contracting for the LRP).
 - (6) Auxiliary loan assistance for students.
 - (7) Consolidated loans (only loans incurred for the use of the Soldier 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 approval by the Under Secretary of Defense for Personnel and Readiness).
- j. Provide the Army with a qualifying loan promissory note or statement from each loan servicing agency that verifies the loan type and that eligible loans were incurred before entering the Regular Army/on active duty.

5-3. Processing Loan Repayment Program claims for enlisted Soldiers

For specific enlistment procedures, refer to AR 601-210. Processing procedures outlined in this paragraph supplement AR 601-210. The CG, USAREC will—

- a. Ensure accuracy of data entered on DD Form 1966, sections 17e and 18k.
- b. Indicate on DA Form 3286 (Annex B) that Regular Army LRP is selected as an option.
- c. Initiate DD Form 2366.
 - (1) Sections 1 and 2 are completed for all accessions.
 - (2) Section 5 is for decision to disenroll from the MGIB. This is an irrevocable disenrollment; a Soldier will not be eligible to enroll in the MGIB at a later date, nor will he or she be allowed to enroll during a subsequent term of service. A Soldier is eligible for the Post-9/11 GI Bill, which will be awarded after completing a subsequent required qualifying ADSO period due to receipt of the Regular Army LRP. Since rules are subject to change, the DVA website at <https://www.benefits.va.gov/gibill/> should be used to verify eligibility and rules for the Post-9/11 GI Bill.
- d. Counsel a Soldier regarding taxation and the importance of maintaining his or her loan records.
- e. Provide a Soldier with complete packet, which includes copies of the following:
 - (1) DA Form 3286 (Annex B) contract that identifies the Regular Army LRP is awarded.
 - (2) Loan promissory note(s) or statement from loan servicing agency that indicates loan type.

- (3) DD Form 1966.
- (4) DD Form 2366.
- (5) DD Form 2475 (DoD Educational Loan Repayment Program (LRP) Annual Application) with section 1 completed by HRC (AHRC–PDP–E).
- (6) DoD Regular Army LRP instructions to Servicemembers.
- (7) Loan servicing agency letter.
- (8) Request for deferment, administrative forbearance, or repayment plan letter sent to loan servicing agency.
- (9) A completed and signed copy of all other applicable forms.
- f. Forward the DD Form 2366 to reception battalion, along with the accession packet.
- g. Assist a Soldier awarded the Regular Army LRP in his or her DA Form 3286 (Annex B) contract in securing a deferment or administrative forbearance from the loan servicing agency on all qualifying loans and ensure the Soldier understands the Army does not assume the loan. Not all loans qualify for deferment and/or forbearance.
- h. Provide HRC (AHRC–PDP–E) with a listing of all eligible participants monthly.

5–4. Student loan deferment and/or forbearance

a. Enrollment in the Regular Army 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 Regular Army LRP as administered by DoD under 10 USC 2171. Soldiers, however, must fill out and submit the required deferment and/or forbearance forms. On the deferment and/or forbearance forms, Soldiers and their commanding officer must complete their individual sections. The HRC (AHRC–PDP–E) Regular Army LRP office cannot assist with this process. Also, 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 a Soldier’s student loan; the Soldier remains responsible for the status of the loan. Soldiers must contact each of their loan servicing agencies requesting repayments and 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 entering delinquency or default. Conditions under which deferments or forbearance are obtained are handled solely between the borrower (Soldier) and the loan servicing agency. Responsibility rests with the borrower to request the deferment, request forbearance, or ensure his or her loan remains in good standing.

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

5–5. 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.

5–6. Entitlements

a. The Regular Army LRP incentive provides for the repayment by the Government of a designated portion of any outstanding loan(s) secured after 1 October 1975 and prior to accepting the Regular Army LRP. The Soldier with Regular Army LRP contracted in Annex B of his or her DA Form 3286 earns 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 of the maximum remaining original unpaid principal amount of the Soldier’s total loan (up to \$65,000 maximum less taxes) or \$1,500, whichever is greater as verified by the loan servicing agency, for up to 3 years. The maximum dollar amount reimbursable under

the Regular Army LRP is DA imposed. Soldiers who accessed prior to 28 April 1992 are not affected by these maximum dollar amounts.

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

c. The Army will make payments directly to the loan servicing agency. Payments are subject to federal and state income taxes as taxable income in the year repayment is made. DFAS will send the Soldier a Regular Army LRP 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 LRP payments are considered income, this withholding may deter 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 (IRS). This refund may be used to make a payment on student loans.

d. In accordance with 31 USC 3702, also known as the Barring Act, the Soldier contracted for the Regular Army LRP has until his or her basic active service date (BASD), which is the date of entry into the Regular Army, plus 6 years to make a claim against the Government for loan payment. For claims beyond this period, Soldiers will first need to obtain authorization for relief from the Army Board for Correction of Military Records, Army Review Board Agency before payments are made by the Government. Full information is available at <https://arba.army.pentagon.mil/abcmr-overview.html>.

5-7. 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 the CG, HRC (AHRC-PDP-E).

c. Soldiers who reenlist will not receive additional payments.

5-8. Processing payments

CG, USAREC processes Regular Army LRP eligible participants and forwards the listing of eligible participants monthly as outlined in paragraph 5-3d to HRC (AHRC-PDP-E). Payments may be claimed for up to six years in accordance with the Barring Act. Claims beyond the BASD plus six years will be processed through the Army Board for Correction of Military Records. Full information is available at <https://arba.army.pentagon.mil/abcmr-overview.html>.

a. CG, HRC (AHRC-PDP-E) will—

- (1) Validate Soldier eligibility for Regular Army LRP.
- (2) Forward to the Soldier a Regular Army LRP packet that includes the following:
 - (a) Letter of instruction.
 - (b) Letter to the Soldier's loan servicing agency.
 - (c) DD Form 2475 with section 1 completed by HRC (AHRC-PDP-E).
- (3) Create a suspense file to ensure the Soldier has been sent the Regular Army LRP packet.

b. The Soldier will—

(1) Initiate the Regular Army LRP process no later than 150 calendar days or 5 months before his or her BASD first year anniversary plus the 2 following years of Regular Army service, based on the loan repayment period (contract).

(2) Follow the provided letter of instruction.

(3) Complete and send a copy of the letter to each loan servicing agency.

(4) Complete section 2 of DD Form 2475 and send a copy to each loan servicing agency.

(5) Ensure the loan repayment process has begun. Follow-up with each loan servicing agency and HRC (AHRC-PDP-E) to ensure HRC (AHRC-PDP-E) received all completed DD Form 2475s for processing.

c. Each loan servicing agency will be asked to—

(1) Complete DD Form 2475, sections 3 and 4.

(2) Forward completed DD Form 2475 to HRC (AHRC-PDP-E) via the address stated on DD Form 2475, section 1 within 120 calendar days of the Soldier's BASD anniversary date. This will ensure timely payments and limit accrued interest by the Soldier.

d. Upon receipt of completed DD Form 2475, CG, HRC (AHRC-PDP-E) will—

- (1) Verify the eligibility of each loan.
 - (2) Prepare the paperwork for authorizing loan repayment.
 - (3) Input the payment plan into the Regular Army LRP database.
 - (4) Verify loan amount, annually.
- e. Upon completion of each full year of Regular Army/active duty—

(1) CG, HRC (AHRC–PDP–E) will—

(a) Authorize DFAS to disburse appropriate Regular Army LRP payment to each loan servicing agency.

(b) Send a letter and/or email to the Soldier stating that DFAS has been authorized to pay the loan in accordance with guidance in the Soldier's original enlistment contract.

(2) DFAS will—

(a) Disburse the payment to the loan servicing agency within 90 calendar days of receipt of HRC (AHRC–PDP–E) notification.

(b) Provide verification of disbursement to HRC (AHRC–PDP–E).

(c) Issue the Soldier a separate Regular Army LRP Form W–2 indicating amount disbursed towards LRP payments, less taxes.

(d) Notify the IRS of the amount paid less taxes.

f. DD Form 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.

h. Soldiers separates from Regular Army/active duty earlier than the initial enlistment term or transfers out of their Regular Army LRP qualifying MOS, they must provide HRC (AHRC–PDP–E) with:

(1) Copy of Member 4 of DD Form 214 if separating.

Note. Submission of DD Form 214 may facilitate a possible future payment toward qualifying loans.

(2) Nonparticipation notification if switching to a new MOS.

(3) The Soldier's current mailing (United States Postal Service) address and personal email address.

5–9. Resolution of discrepancies

a. If the loan servicing agency has not received payment within 90 days after notification from HRC (AHRC–PDP–E) the Soldier will—

(1) Send an email to DFAS at dfas.indianapolis-in.jfl.mbx.dfas-in-systems@mail.mil.

(2) Initiate DA Form 2142 (Pay Inquiry) through the local finance and accounting office.

(3) In both paragraphs 5–9a(1) and 5–9a(2), include the transmittal number (found in the notification letter/email previously received from the HRC (AHRC–PDP–E) as noted in paragraph 5–8e(1)(b)).

b. Soldiers who believe they contracted for the Regular Army LRP option but have not received a letter from HRC (AHRC–PDP–E) by the eighth month of their first year in the Regular Army/on active duty should provide HRC (AHRC–PDP–E) with copies of the following:

(1) DA Form 3286 (Annex B).

(2) DD Form 1966.

(3) DD Form 2366 for MGIB disenrollment.

(4) Promissory notes or statement from each loan servicing agency, indicating loan type.

(5) A letter of explanation stating reasons and circumstances that justify eligibility including full name (first, middle, and last name), DoD identification number, enterprise email address, personal email address, and a current physical mailing (United States Postal Service) address.

(6) Veterans submit, in addition to the items listed in paragraphs 5–9b(1) through 5–9b(5), copy of Member 4 of DD Form 214.

c. All Regular Army LRP questions must be sent to Commander, U.S. Army Human Resources Command (AHRC–PDP–E), Department 480, 1600 Spearhead Division Avenue, Fort Knox, KY 40122–5401.

Chapter 6

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

6-1. Authority

a. This chapter provides policy 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:

- (1) Any loan made, insured, or guaranteed under Title IV, Part B, D, or E of the Higher Education Act of 1965.
 - (2) Guaranteed student loans and/or Stafford loans.
 - (3) National direct student loans/Perkins loans.
 - (4) Supplemental loans for students.
 - (5) Federal insured student loans.
 - (6) Parent loan for undergraduate students (only loans incurred for the use of individual contracting for the LRP).
 - (7) Auxiliary loan assistance for students.
 - (8) Consolidated loans (only loans incurred for the use of individual contracting for the LRP).
 - (9) As of 1 January 2006, 10 USC 16301 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).
- b. Selection of the SLRP incentive must be accomplished by the applicant when they sign a SELRES contractual agreement as described in this chapter.
- c. Applicant may select the SLRP incentive even though they have no outstanding loan(s) when signing the contractual agreement.
- d. 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 RC annual SRIPs, subject to eligibility criteria of each program offered.

6-2. Eligibility

To be eligible for the SLRP incentive, a Soldier must contractually obligate himself or herself to serve satisfactorily per AR 135-91. A Soldier 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 USAR or from the USAR 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 an 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 (SLRP)) on the same date of the Service contractual agreements (DD Form 4 (Enlistment/Reenlistment Document-Armed Forces of the United States), 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 Regular 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. Meets the following criteria for continuing receipt of the SLRP incentive when transferring into the USAR:

(1) An ARNG Soldier eligible for loan repayment will retain eligibility for their original designated contracted amount upon transfer to the USAR less the cumulative repayment amounts received from the losing RC. This is provided the Soldier continues to serve in the contracted MOS, or the transfer is based on unit transition in circumstances not requiring termination, or otherwise authorized by the CAR (see AR 601–210).

(2) An ARNG Soldier eligible for loan repayment who is transferred to a USAR critical MOS (higher-designated amount position) will retain SLRP eligibility at the ARNG designated amount. This is provided the transfer is based on unit transition in circumstances not requiring termination or is otherwise authorized by the CAR.

(3) If the Soldier is authorized to continue under the SLRP, a new DA Form 5261–4 must be prepared; however, this act does not create a new entitlement, but continues the Soldier in the existing entitlement amount as listed on the original ARNG contract. The new DA Form 5261–4 will be prepared in the gaining unit and witnessed by a Service representative in the grade of E–7 or higher.

(4) A Soldier does not gain incentive eligibility simply because of a transfer from one RC to another who is offering an incentive. The transfer process does not represent a REFRAD, enlistment, affiliation, reenlistment, or extension requirement for incentive eligibility.

d. 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.

e. Is contracting for a term of service in the SELRES.

(1) An 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 Regular Army, with an 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 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.

f. 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).

g. 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.

h. A Soldier may retain their SLRP incentive upon acceptance into the AGR program provided one of the following criteria be met:

(1) The Soldier is assigned to an AGR position with the same MOS or area of concentration (AOC) for which the SLRP was originally authorized.

(2) The Soldier continues to drill in the MOS or AOC for which the SLRP was originally authorized if assigned to an AGR position that does not possess the same MOS or AOC.

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) Meet the requirements cited on DA Form 5261-4 or ARNG addendum yearly and initiate the request for loan repayment by completing DD Form 2475.

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 DCS, 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: 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 will not exceed 15 percent of the loan amount or \$500, whichever is greater plus interest.

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 365 days after the anniversary date if seeking to pay principal and interest for eligible loans.

(3) A DD Form 2475 received more than 365 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. Claims beyond 6 years will be processed through the Army Board for Correction of Military Records. Full information is available at <https://arba.army.pentagon.mil/abcmr-overview.html>. Submissions may be mailed to the Army Review Boards Agency, 251 18th Street South, Suite 385, Arlington, VA 22202-3531.

(5) Multiple year payments are eligible to be used on the current year DD Form 2475s, provided that Soldiers' loans are not in default at time of payment but interest will be paid for the current anniversary year only.

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

b. Soldiers may obtain their most current loan information from the National Student Loan Data System (NSLDS) website 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.

c. Procedures for processing SLRP payments are in accordance with respective component policies. General SLRP processing procedures are as follows:

(1) Unit or S1/G1 in conjunction with Soldier will complete DD Form 2475.

(2) Lending agency will complete Part 4 of DD Form 2475 (when applicable based upon component standard operating procedure).

(3) Soldier will provide updated loan information from the U.S. Department of Education via NSLDS within 30 days of date of eligibility.

(4) Soldier will provide DD Form 2475 returned from the lender to unit or S1/G1.

(5) DD Form 2475 and/or NSLDS is processed through appropriate channels per component standard operating procedures.

6-6. Calculating entitlement and making disbursement

a. Examples for calculating entitlements are shown in table 6-1.

(1) *Table 6-1, loan A and/or B.* A single or multiple loans from one or more lender or note holder is outstanding at the time an individual contracts for a SELRES term of service and completes DA Form 5261-4 or ARNG SLRP addendum. Loan A and/or B is calculated at the authorized rate of 15 percent of the disbursed amount and determined the 15 percent is of the greater amount authorized in accordance with 10 USC 16301. The amount combined with the annual interest is a sum less than the remaining balance of the note; therefore eligible for full repayment. (If the remaining balance of the note is less than the authorized calculated amount then only the balance of the remaining note may be repaid; as long as the maximum authorized cap has not been reached.)

(2) *Table 6-1, loan C.* A single loan from one lender or note holder is outstanding at the time an individual contracts for a SELRES term of service and completes DA Form 5261-4 or ARNG SLRP addendum. Loan C is calculated at the authorized rate of 15 percent of the disbursed amount and determined the \$500 amount is of the greater amount authorized in accordance with 10 USC 16301. The amount combined with the annual interest is a sum less than the remaining balance of the note; therefore eligible for full repayment. (If the remaining balance of the note is less than the authorized calculated amount then only the remaining note balance may be repaid; as long as the maximum authorized cap has not been reached.)

(3) *Table 6-1, loan D.* A single loan from one lender or note holder is outstanding at the time an individual or contracts for a SELRES term of service and completes DA Form 5261-4 or ARNG SLRP Addendum. Loan D is calculated at the authorized rate of 15 percent of the disbursed amount and determined the \$500 amount is of the greater amount authorized in accordance with 10 USC 16301. The amount combined with the annual interest is a sum more than the remaining balance of the note; therefore, only the remaining balance is eligible for full repayment. (If the remaining balance of the note is less than the authorized calculated amount then only the remaining note balance may be repaid; as long as the maximum authorized cap has not been reached.)

(4) *Table 6-1, loans A through D.* A single or multiple loan(s) from one or more lender (s) or note holder is outstanding at the time an individual contracts for a SELRES term of service and completes DA Form 5261-4 or ARNG SLRP addendum. Loans A through D are each calculated at the authorized rate as noted in paragraphs 6-6a(1) through 6-6a(3). The total amount combined with the annual interest is a sum lower than the authorized annually repayment amount; therefore, a full calculated repayment is authorized for each loan. (If the remaining balance of the note is less than the authorized calculated amount, then only the remaining note balance may be repaid, as long as the maximum authorized cap has not been reached.)

b. Loan(s) may not be required at the time of completing DA Form 5261-4 or ARNG SLRP addendum. Further processing will be in accordance with ARNG and USAR annual SRIP policy.

**Table 6-1
Sample Student Loan Repayment Program repayment**

| Loan | Loan Amount | Amount Disbursed | Loan Balance | Annual interest | 15% Calculated Amount from Disbursed Amount | If calculated is less than <500 | Repayment to Lender |
|------|-------------|------------------|--------------|-----------------|---|---------------------------------|---------------------|
| A | 25,000 | 20,000 | 15,000 | 75 | 3,000 | | 3,075 |
| B | 5,000 | 5,000 | 3,523 | 25 | 750 | | 775 |
| C | 2,000 | 2,000 | 1,500 | 15 | 300 | 500 | 515 |
| D | 2,000 | 2,000 | 342 | 5 | 300 | 500 | 347 |
| | | | | | 4,350 | | 4,712 |

6-7. Continued receipt of Student Loan Repayment Program incentives

Continued receipt of SLRP incentives will be in accordance with DoDI 1205.21 and this paragraph. A Soldier may be eligible for continued receipt of incentives under the following conditions:

a. For normal career progression (see DA Pam 611-21).

- b. When involuntary transfer between Army RCs is due to unit transition per this regulation.
- c. When the transfer is COG and authorized by the CNGB or CAR. In this case, the Soldier must become MOS qualified in the new skill within 24 months, or incentives will be terminated.
- d. Involuntarily transferred ACASP Soldiers will continue to receive payments as scheduled.
- e. When returning from an authorized period of nonavailability. Soldier must meet all requirements outlined in AR 601–210.
- f. Mobilized RC Soldiers will be allowed to retain all RC annual SRIP incentives for which they had qualified to receive prior to mobilization, regardless of position and MOS assigned to fill during mobilization. Following mobilization, the Soldier must return to the original contracted SELRES MOS and position or another bonus MOS where the position is annotated on the current RC annual SRIP at the time of REFRAD, and return to SELRES duty to be able to continue to receive any remaining incentive payments.
- g. During a period of suspension of favorable personnel actions, receipt of incentives is suspended except for certain Army physical fitness test failures or failures to meet body fat standards as prescribed in AR 601–210. When the suspension has been favorably lifted, continued receipt of incentives is authorized.
- h. For SLRP incentives, enlisted Soldiers who enter a commissioning program and/or accept an appointment or commission as an officer or WO in a SELRES (any AOC) may continue to receive SLRP payments as stipulated in their original contract so long as they remain otherwise qualified.

6–8. Reinstatement of Student 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) Complete the period of authorized nonavailability within the required time limit in AR 601–210.
 - (2) Rejoin an existing vacancy in the SELRES authorized the Soldier's grade within:
 - (a) The incentive-authorized unit or specialty in which the Soldier was originally assigned; or
 - (b) An incentive-authorized unit or specialty offered in the currently approved RC annual SRIP upon return from authorized nonavailability.
 - (3) Extend their contract, enlistment, or reenlistment agreement within 90 days after completing the period of nonavailability in order to serve out the full incentive contract period in the SELRES. This is provided the unit reenlistment officials have access to the Soldier's personnel records and are able to verify the Soldier's eligibility to extend.
- b. A Soldier who complies with all requirements listed in paragraph 6–8a will be entitled to payments resumed on the adjusted anniversary date of satisfactory creditable SELRES service, provided funding is available.

6–9. Recoupment of Student Loan Repayment Program incentives

- a. A Soldier participating satisfactorily in the SLRP program may be eligible to have repayment apportioned with proper fractional credit for each portion of the year served, unless restricted by the SELRES SRIP policy.
 - (1) If a Soldier is ordered to active duty under 10 USC 12301(d) and it is his or her initial entry on active duty, they will not be terminated if they elect continuation of SLRP and decline MGIB utilizing DD Form 2366, item 4.
 - (2) 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]."
 - (3) 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]."
- b. The SLRP and HPLRP are 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.
 - (1) The recoupment amount is based on the following formula:
 - (a) The number of months served satisfactorily during the term for which an incentive was paid will be multiplied by the monthly rate authorized by the particular incentive. The monthly rate is calculated by

dividing the total incentive amount by the number of months of service the member has agreed to serve. Partial month credit will be calculated by dividing number of days served by 30. This calculation results in the Servicemember's "earned incentive."

(b) The earned incentive must be subtracted from the total incentive amount paid to the individual to date (initial and any subsequent payments).

(c) If the earned incentive is less than the total incentive amount paid, the overpayment to the individual must be recouped. If the earned incentive is more than the payments received to date (total of initial and any subsequent payments), the excess amount will be paid in the final installment.

(2) Commanders are responsible for initiating recoupment procedures whenever a member's eligibility to an incentive is terminated and recoupment is required by this regulation or applicable policy. When a commander is not in the Soldier's chain of command, the incentives program manager will initiate recoupment procedures.

(3) For cases in which a Soldier fails to maintain eligibility for an incentive and recoupment procedures are initiated, any refund made by a Soldier under recoupment procedures will not affect that Soldier's military service obligation. A member in the ARNG or USAR must serve the balance of the term of service entered into contractually or by statutory requirements.

c. Commanders will not recoup for any of the following reasons:

(1) When the Soldier's unit is in transition per AR 601–210. However, termination with recoupment action is required when a Soldier who loses his or her position due to unit transition per AR 601–210 refuses a reassignment in the SELRES.

(2) Acceptance of an immediate appointment as a commissioned officer or WO in any component of the Army excluding the IRR or ING. An enlisted Soldier accepting an appointment as a commissioned officer or WO is not subject to recoupment of any enlistment or reenlistment bonus, including lump sums.

(3) Soldiers who become simultaneous members of an authorized officer commissioning program, to include those drawing a stipend, will remain in the SLRP and other incentive programs while in an advanced training status provided he or she continues to perform military duties as specified in his or her SLRP or incentives agreement. Upon commissioning or appointment as an officer in an RC, the SLRP or incentive will remain in effect until the terms of the original agreement are fulfilled. Soldiers who commission into the Regular Army will have the SLRP terminated without recoupment on the date of commissioning.

(4) Separation from the SELRES or transfer from the designated bonus position is because of death, injury, illness, or other impairment that is not the result of any misconduct by the Soldier.

(5) Soldier is ordered to extend active duty (voluntarily or involuntarily) and accessed in the Regular Army end strength. Additionally, those on extended active duty can still be a TPU Soldier.

(6) Soldier enters into an authorized period of nonavailability. As an exception, recoupment is authorized when a Soldier fails to meet the requirements listed in AR 601–210 upon return from an authorized period of nonavailability.

(7) Soldier accepts an AGR position outside the parameters set by paragraphs 6–2*f* and 6–2*h*, a permanent military technician position, or temporary military technician position of more than 179 days where membership in the SELRES is a condition of employment. These Soldiers will have their enlistment, reenlistment, and/or affiliation bonus terminated without recoupment as long as they serve 1 or more days in the losing SELRES (for example, 1 or more days on or after the effective date of the contract).

(8) A member paid an education incentive pay for a period of enlistment and/or affiliation (or reenlistment and/or extension) in a component of the Army (Regular, USAR, or ARNG) who is discharged for immediate reenlistment or affiliation in any other component of the Army (Regular, USAR, or ARNG) or any other U.S. military Service (AC or RC) for which no education incentive pay is paid, may be considered to have completed the full term of service specified in the former enlistment or officer contract provided the term of the latter service contract includes the remaining period of service from the former contract (this does not pertain to the military service obligation). In such cases, no recoupment of incentive paid will occur. AR 601–210 governs cases for movement between the ARNG and USAR. Enlistment and officer bonuses normally terminate without recoupment when moving from one component to another. Doubtful cases will be referred to the approval authority in paragraph.

6–10. Administrative contacts—correction of errors

a. Correction of contracts and administrative questions should be directed to the applicable agency for the ARNG and USAR respectively. Since SLRP is also a reenlistment option, AR 140–111 and 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 DCS, 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. For IRR, IMA, or AGR Soldiers, send inquiries directly to CG, HRC (AFRC–CIE). USAR inquiries regarding the SLRP for Soldiers assigned to TPUs should be sent through the chain of command to HRC.

d. Separated Soldiers will process actions through the Army Board for Correction of Military Records after all administrative remedies have been exhausted with the contracting service. Full information is available at <https://g1arng.army.pentagon.mil/programs/abcmr/pages/default.aspx>. Submissions may be mailed to the Army Review Boards Agency, 251 18th Street South, Suite 385, Arlington, VA 22202–3531.

Chapter 7

Chaplain Loan Repayment Program Reserve Component

7–1. Authority

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 (see 20 USC 1071, also known as Federal Stafford Loans);

(2) Any loan made under 20 USC Chapter 28, Subchapter IV, Part D (known as the William D. Ford Federal Direct Loan Program);

(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 nonprofit private entity.

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

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, meets the following rules and requirements:

(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.

(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) According to 10 USC 16303, individuals enrolled in the Chaplain Candidate Program are not eligible to participate in the 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. A Soldier may retain their CHLRP incentive upon acceptance into the AGR program provided one of the following criteria be met:

(1) The Soldier is assigned to an AGR chaplain position.

(2) The Soldier continues to drill as a chaplain if assigned to an AGR position that does not possess the same AOC.

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 should inform the Soldier that 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) Meet the requirements cited on DA Form 5261–4 or ARNG addendum yearly and initiate the request for loan repayment by initiating DD Form 2475.

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 (see 10 USC 16303(c)(2)). Current policy states that annual repayments will not exceed one-third of the contracted amount per CHLRP issuance (extension) to include interest and related fees.

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 CHLRP 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(s) to be repaid is one-third of the \$20,000 contracted amount inclusive of interest and related fees.

7-5. Payment processing

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

(1) Once approved for the program, Soldiers will be notified within 90 days of their anniversary date of contracting for CHLRP 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 365 days after the anniversary date if seeking to pay principal and interest for eligible loans.

(3) A DD Form 2475 received more than 365 days after the CHLRP 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. Claims beyond 6 years will be processed through the Army Board for Correction of Military Records. Full information is available at <https://arba.army.pentagon.mil/abcmr-overview.html>.

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

(6) Payment may not be made on a loan that is in default. Payment may be resumed when the loan returns to good standing.

b. Soldiers may obtain their most current loan information from the NSLDS website and submit the report in lieu of having the lending agency fill out 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.

c. Procedures for processing SLRP payments are in accordance with respective component policies. General SLRP processing procedures are as follows:

(1) Unit or S1/G1 in conjunction with Soldier will complete DD Form 2475.

(2) Lending agency will complete Part 4 of DD Form 2475, when applicable.

(3) Soldier will provide updated loan information from the U.S. Department of Education via NSLDS within 30 days of date of eligibility.

(4) Soldier will provide DD Form 2475 returned from the lender to unit of S1/G1.

(5) DD Form 2475 and/or NSLDS is processed through appropriate channels per component standard operating procedures.

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 following reasons apply:

a. The Soldier enters on active duty in an AC of a U.S. Armed Force.

b. The Soldier enters on active duty in an AGR status and is terminated per this paragraph.

c. The Soldier was transferred or reassigned to the IRR as a direct result of a reduction of over strength, RIF, unit deactivation, or unit relocation.

d. 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. 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. A Soldier separates from a SELRES unit of the USAR or ARNGUS for any reason, except contingency operations, active duty for operational support, and extended active duty. Separation includes, but is not limited to:

- (1) Discharge or transfer to the IRR, ING, Standby, or Retired Reserve, other than transfer to the IRR for mobilization.
- (2) Enlistment or appointment in the Regular Army or in an AC 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 CHLRP incentives is suspended. When the suspension has been favorably lifted, continued receipt of incentives is authorized.

b. A Soldier may be eligible for continued receipt of CHLRP incentives under voluntary entry or if ordered to extended active duty in the Regular Army (accessed to the strength accountability of the active military service of the Army).

c. 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.

d. 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 the basic incentive received multiplied by the basic obligated months not completed divided by total obligated months in a contract (for 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.

e. 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.

f. 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.

g. 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 the Soldier's own misconduct.

(3) The Soldier 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.

h. 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.

i. 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.

j. A Soldier who does not comply with all of the requirements in AR 601–210 will be subject to termination of incentives with recoupment action if required.

k. A Soldier who complies with all requirements listed in AR 601–210 will be entitled to payments resumed on the adjusted anniversary date of satisfactory creditable SELRES service provided funding is available.

7–9. Administrative contacts-correction of errors

a. Correction of contracts and administrative questions should be directed to the applicable agency listed in this paragraph 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 or territory incentive manager. State and/or territory incentive managers 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. Correction of administrative errors will be addressed to Commander, U.S. Army Reserve Command (AFRC–PRT–R), 4700 Knox Street, Fort Liberty, 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. Separated Soldiers will be processed through the Army Board for Correction of Military Records. Full information is available at <https://arba.army.pentagon.mil/abcmr-overview.html>.

Chapter 8

Selected Reserve Health Professionals Loan Repayment Program

8–1. General

This chapter provides policy 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 SELRES 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 SECDEF 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 known as 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 re-enter 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 Army Medical Department (AMEDD) incentives policy for their specialty in their component if their specialty is listed on the current Critical Wartime Shortage List.

(2) Health professionals loan repayment (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 they have 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 Director, DFAS repays designated loans for an officer that—

- 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 healthcare 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 loans 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 loans.

d. The unit commander, healthcare 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 ARNG officers will be incorporated as part of the accession packet. A copy will be filed in the officer's iPERMS file.

(2) The original copy for USAR officers will be sent to Commander, U.S. Army Human Resources Command (AHRC–OPH–PAI), Incentives Branch, Department 270, 1600 Spearhead Division Avenue, Fort Knox, KY 40122–5401, for insertion in the officer's iPERMS file.

(3) 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, not including interest/fees.

(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 is 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 such that 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 original 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 with instruction sheet. The officer will obtain DD Form 2475 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 should complete section 3.

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

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

(b) *Army National Guard.* SIM or state AMEDD recruiter/OSM.

8-7. Voluntary Regular Army assignment

An officer who voluntarily enters on active duty, is assigned to the Regular Army, and is placed on the active duty list terminates his or her 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 Regular 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. Participants must meet the eligibility criteria outlined in paragraph 8-3.

b. Participants 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.

g. For 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, (AHRC-OPH-PAI) Incentives Branch, Department 270, 1600 Spearhead Division Avenue, 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 his or her 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 GIMS.

h. STRAP participants who use their HPLRP incentives prior to completion of their specialized training are not required to have their service obligation extended.

- i.* 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.
- j.* 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.
- k.* 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 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 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 will not exceed that which is authorized in 10 USC 2121. This rate is subject to annual increases on 1 July of each year as determined by the SECDEF. The officer incurs a 1-year obligation for each 6-month period (or part thereof) that he or she receives 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 bimonthly payments. During the obligor phase, a participant pays back the obligation incurred. The participant must serve their obligation upon successful completion of the program. There are two types of stipend programs.

(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 AOC of 00E67 and branched into the Medical Service Corps (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 (Dental Corps 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 Soldier is affiliated, may apply for STRAP.

(c) STRAP for Master of Science in Nursing 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 Bachelor of Science in Nursing 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 his or her 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 courses. The participant must be approved for the stipend through the USAREC selection board.

(d) STRAP for Master of Science in Nursing program may be offered to Army Nurse Corps 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 per AR 40-1. 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) *U.S. Army Reserve*. Commander, U.S. Army Human Resources Command (AHRC-OPH-PAI), Incentives Branch, Department 270, 1600 Spearhead Division Avenue, Fort Knox, KY 40122-5401.

(2) *Army National Guard*. Chief, National Guard Bureau (ARNG-HRM-I) (AMEDD Incentives), 111 South George Mason Drive, Arlington, VA 22204-1382.

9-3. Eligibility

To be eligible for this program, participants must meet the following requirements:

a. The officer must be a commissioned officer in the Ready Reserve, but not serving in an AGR or military technician status.

b. The officer must be designated or assigned for service in the Medical Corps, Army Nurse Corps or in a student status (00E67), MS/Medical Corps, or MS/Dental Corps.

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 must be 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. The officer must remain assigned to the Ready Reserve while participating in the Health Professional Stipend Program.

h. The officer must be able to fulfill the incurred service obligation prior to the officer's mandatory removal based on age and/or length of service.

i. The officer must not be receiving financial assistance under an ROTC or Health Professions Scholarship Program.

j. The officer must be approved for the stipend through the USAREC selection board.

9-4. Application and enrollment procedures

a. An area ARNG AMEDD recruiter or USAR AMEDD recruiter, respectively, should assist civilian applicants seeking concurrent appointment in the ARNG or USAR (Medical Corps, Army Nurse Corps, MS/Medical Corps, or MS/Dental Corps) to initiate their 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 these instructions:

(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 CG, 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 to CNGB (NGB-GSS).

(3) If a Medical Corps or Dental Corps officer has previously been boarded and approved by CG, USAREC for participation in MDSSP, that officer is not required to re-board for STRAP; however, ARNG officers transferring to the USAR with the STRAP option will be required to board for STRAP. See 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 The Surgeon General (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) 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 NGB Form 810 (Specialized Training Assistance Program Enrollment Verification) for enrollment verification. The NGB Form 810 will be uploaded into GIMS between 1 June to 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 school's letterhead is required in addition to NGB Form 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 those listed in this paragraph):

(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. Participation in the Health Professional Stipend Program may be terminated if an officer—

(1) 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.

(2) Fails to meet or maintain the eligibility requirement for the Health Professional Stipend Program. These requirements include, but are not limited to the following:

(a) Membership in good standing in the Ready Reserve.

(b) Valid licensure, as required.

(c) Attendance in good standing at the specialized course of training or educational program.

(3) Is convicted of any of the following:

(a) A felony as defined under federal, state, or local law.

(b) 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.

(4) 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.

(5) Becomes an unsatisfactory participant under the provisions of AR 135–91.

(6) Exceeds the maximum period authorized for suspension in paragraph 8–6.

(7) 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 AOC 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 SECDEF 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 his or her 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 his or her 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 SECDEF 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.

Appendix A

References

Section I

Required Publications

Unless otherwise indicated, DA publications are available on the Army Publishing Directorate website at <https://armypubs.army.mil/>. DoD issuances are available at <https://www.esd.whs.mil/dd/>. The CFR is available at <https://www.ecfr.gov/>. National Guard Bureau publications are available at <https://www.ngbpmc.ng.mil/>. PLs are available at <https://www.congress.gov/public-laws/>. The USC is available at <https://uscode.house.gov/>.

AR 40–1

Composition, Mission, and Functions of the Army Medical Department (Cited in para 9–2c.)

AR 135–18

The Active Guard Reserve Program (Cited in para 3–3c.)

AR 135–91

Service Obligations, Methods of Fulfillment, Participation Requirements, and Enforcement Provisions (Cited in para 3–13a.)

AR 140–111

U.S. Army Reserve Reenlistment Program (Cited in para 3–8a(4).)

AR 600–8–2

Suspension of Favorable Personnel Actions (Flag) (Cited in para 4–15a(1).)

AR 601–210

Regular Army and Reserve Components Enlistment Program (Cited in paras 2–7a(1).)

AR 601–280

Army Retention Program (Cited in para 3–8a(3).)

AR 621–5

Army Continuing Education System (Cited in paras 1–15b(7).)

AR 635–200

Active Duty Enlisted Administrative Separations (Cited in para 2–3e(2).)

DTM 18–006

Transferability of Unused Post-9/11 GI Bill Educational Benefits by Recipients of the Purple Heart (Cited in para 4–1.)

NGR 600–7

Selected Reserve Incentive Programs (Cited in para 6–10a.)

NGR 600–200

Enlisted Personnel Management (Cited in para 6–2d.)

NGR 614–1

Inactive Army National Guard (Cited in para 7–8i(1).)

PL 98–525

Department of Defense Authorization Act, 1985 (Cited in para 2–1.)

PL 101–510

National Defense Authorization Act for Fiscal Year 1991 (Cited in para 2–1.)

PL 102–484

National Defense Authorization Act for Fiscal Year 1993 (Cited in para 2–1.)

PL 102–568

Veterans' Benefits Act of 1992 (Cited in para 2–1.)

PL 103–160

National Defense Authorization Act for Fiscal Year 1994 (Cited in para 2–1.)

PL 104–201

National Defense Authorization Act for Fiscal Year 1997 (Cited in para 2–4a(2).)

PL 104–275

Veterans' Benefits Improvements Act of 1996 (Cited in para 2–1.)

PL 106–398

Floyd D. Spence National Defense Authorization Act for Fiscal Year 2001 (Cited in para 2–1.)

PL 106–419

Veterans Benefits and Health Care Improvement Act of 2000 (Cited in para 2–1.)

PL 107–14

Veterans' Survivor Benefits Improvements Act of 2001 (Cited in para 2–1.)

PL 107–103

Veterans Education and Benefits Expansion Act of 2001 (Cited in para 2–1.)

PL 107–107

National Defense Authorization Act for Fiscal Year 2002 (Cited in para 2–1.)

PL 110–252

Supplemental Appropriations Act, 2008 (Cited in para 4–1.)

PL 111–32

Supplemental Appropriations Act, 2009 (Cited in para 4–1.)

PL 111–377

Post-9/11 Veterans Educational Assistance Improvements Act of 2010 (Cited in para 4–1.)

PL 112–26

Restoring GI Bill Fairness Act of 2011 (Cited in para 4–1.)

PL 113–146

Continuing Appropriations Act, 2014 (Cited in para 4–1.)

PL 115–48

Harry W. Colmery Veterans Educational Assistance Act of 2017 (Cited in para 4–1.)

PL 115–62

Department of Veterans Affairs Expiring Authorities Act of 2017 (Cited in para 4–1.)

PL 116–35

Let Everyone Get Involved in Opportunities for National Service Act (Cited in para 4–1.)

38 CFR 21

Veteran Readiness and Employment and Education (Cited in para 4–1.)

78 FR 34254

Federal Register, Volume 78, Number 110 (Available at <https://www.govinfo.gov>.) (Cited in para 4–15*i*.)

10 USC

Armed Forces (Cited in para 2–3a(2).)

10 USC 1142

Preseparation counseling; transmittal of certain records to Department of Veterans Affairs (Cited in para 1–15*b*(4).)

10 USC 1174

Separation pay upon involuntary discharge or release from active duty (Cited in 2–3*b*(1).)

10 USC 2005

Advanced education assistance: active duty agreement; reimbursement requirements (Cited in para 7–8*d*.)

10 USC 2107

Financial assistance program for specially selected members (Cited in para 2–4a(2).)

10 USC 2121

Establishment (Cited in para 9–2a.)

10 USC 2141

Educational assistance program: establishment (Cited in para 2–9d.)

10 USC 10143

Ready Reserve: Selected Reserve (Cited in para 3–13b(5).)

10 USC 10147

Ready Reserve: training requirements (Cited in para 4–4j.)

10 USC 12301

Reserve Components generally (Cited in para 3–13e.)

10 USC 12302

Ready Reserve (Cited in para 3–13e.)

10 USC 12304

Selected Reserve and certain Individual Ready Reserve members; order to active duty other than during war or national emergency (Cited in para 3–13e.)

10 USC 12732

Entitlement to retired pay: computation of years of service (Cited in para 4–15a(6).)

10 USC 16301

Education loan repayment program: members of Selected Reserve (Cited in para 6–1a.)

10 USC 16303

Loan repayment program: chaplains serving in the Selected Reserve (Cited in para 7–1a.)

31 USC 3702

Authority to settle claims (Cited in para 5–6d.)

32 USC

National Guard (Cited in para 2–3a(2).)

38 USC 3001

Purposes (Cited in para 2–2b.)

38 USC 3033

Bar to duplication of educational assistance benefits (Cited in para 4–8d.)

38 USC 3301

Veterans' Benefits (Cited in para 4–3.)

38 USC 3315

Licensure and certification tests (Cited in para 4–6f.)

38 USC 3319

Authority to transfer unused education benefits to family members (Cited in para 4–15d(6)(b).)

Section II**Prescribed Forms**

Unless otherwise indicated, DA forms are available on the Army Publishing Directorate website (<https://armypubs.army.mil/>) and DD forms are available at the Executive Services Directorate website (<https://www.esd.whs.mil/directives/forms/>).

DA Form 5261–4

Student Loan Repayment Program Addendum (Prescribed in para 6–2b.)

DA Form 5435

Statement of Understanding–The Selected Reserve Montgomery GI Bill (Prescribed in para 3–7a.)

DA Form 5435–1

Statement of Understanding–The Selected Reserve Montgomery GI Bill–Kicker Program (Prescribed in para 3–22a(9).)

DA Form 5447

Officer Service Agreement–Selected Reserve Education Assistance Program (Prescribed in para 3–4e.)

DA Form 5536

Agreement Health Professionals Loan Repayment (HPLR) (Prescribed in para 8–3b.)

DA Form 5685

New Specialized Training Assistance Program (New STRAP) Service Agreement (Prescribed in para 8–8g.)

DD Form 2366

Montgomery GI Bill Act of 1984 (MGIB) Basic Enrollment (Prescribed in para 2–4b.)

DD Form 2384–1

Notice of Basic Eligibility (NOBE) (Available through normal forms supply channels) (Prescribed in para 3–4i.)

Appendix B

Army College Fund

B-1. Explanation of Army College Fund entitlements

Since April of 1993, the following procedures have applied with respect to MGIB and ACF:

a. 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.

b. 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, 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, 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.

B-2. Sample Army College Fund calculations

a. 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 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).

b. 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

Internal Control Evaluation

C–1. Function

The function covered by this evaluation is management of the SLRP.

C–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.

C–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).

C–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 of this regulation?

C–5. Supersession

This evaluation replaces the evaluation previously published in AR 621–202, dated 26 September 2017.

C–6. Comments

Help make this a better tool for evaluating internal controls. Submit comments to the Deputy Chief of Staff, G–1 (AHRC–PDP–E), Department 480, 1600 Spearhead Division Avenue, Fort Knox, KY 40122–5401.

Glossary of Terms

Active Guard Reserve personnel

National Guard and Reserve members who are on voluntary active duty providing full-time support to National Guard, Reserve, and AC organizations for the purpose of organizing, administering, recruiting, instructing, or training the RCs.

Break in service

A period of more than 90 days between the date when individuals are released from active duty (or otherwise receive a complete separation from active duty service) and the date they re-enter on active duty (up to 365 days).

Continuous active duty

Active duty served without interruption.

Critical skill

Skill or specialty designated by the SECARMY as a skill or specialty in which there is a critical shortage of personnel or for which it is difficult to recruit.

Delayed Entry Program

A program under which an individual may enlist in an RC and specify a future reporting date for entry on active duty that would coincide with availability of training spaces and with personal plans; allows individuals to delay entry onto active duty in the Army for a period of up to 365 days.

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 external or competency based diploma.

Kicker

Supplemental educational assistance awarded at the discretion of the SECARMY for Soldiers with critical skills or specialties or 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 and paid in conjunction with 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 active duty, SELRES, and IMA service regardless of branch of Service or component. It does not include those who have retired, have 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

Those units and individuals within the Ready Reserve designated by the SECARMY and approved by the Joint Chiefs of Staff as so essential to initial wartime missions that they have priority over all other reserves.

Top-Up

The name given to the DVA program that allows a Soldier to combine MGIB—AD benefits under 38 USC Chapter 30 with Army tuition assistance in cases in which the cost of the course exceeds the tuition assistance rate cap.

Veteran

For the purposes of MGIB—AD, MGIB—SR, and Post-9/11 GI Bill, the term veteran includes Soldiers who have separated from active duty and are serving in an active status in the SELRES.

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