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ARNG-HRH (RN 621)

23 September 2022

MEMORANDUM FOR The Adjutants General of All States, Puerto Rico, Guam, the US Virgin Islands, and the Commanding General of the District of Columbia

SUBJECT: FY23 Army National Guard (ARNG) Voluntary Education (VolEd) Policy (PPOM 22-038)

1. Effective Date. This policy is effective on 1 October 2022 and supersedes the FY22 VolEd policy, change 1 (PPOM #22-010). A summary of changes is included on page three.

2. Purpose/Intent. VolEd programs assist the ARNG meet recruiting, retention, and readiness goals by helping Soldiers obtain their educational goals and objectives and further their military and civilian careers.

3. Applicability. This policy applies to all States, Puerto Rico, the US Virgin Islands, Guam, and the District of Columbia.

4. Availability. This policy is available in the general channel on the [ARNG-Staff Education Services Team located on Microsoft Teams](#).

5. Point of contact. The POC for this policy is Dr. Kenneth A. Hardy, Chief, Education Services Branch at 703-607-9744 or kenneth.a.hardy3.civ@army.mil.

Encl

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FY23 Army National Guard

Voluntary Education Policy



Policy and Guidance for Administering ARNG Education Programs and Services

SUMMARY OF CHANGES

- Enclosure 2: Academic Institution Access
 - Paragraph 3b: Added requirement for Academic Institutions/Vendors to submit an Installation Access Request via ArmyIgnitED.
- Enclosure 3: Training and System Requirements
 - Paragraph 6a: Updated ArmyIgnitED roles.
 - Appendix: Changed submission process for BEAST access.
- Enclosure 4: Montgomery GI Bill-Selected Reserve (MGIB-SR)
 - Paragraph 11: Updated VA Reverse Inquiries process.
- Enclosure 5: MGIB-SR Kicker
 - Paragraph 6a and 6b: Authorized \$350 Kicker rate for NPS and PS accession Kickers for FY23.
- Enclosure 6: Montgomery GI Bill – Active Duty
 - Paragraph 2: Added Public Law 116-315 to the list of references.
 - Paragraph 8: Added Chapter 30 Sunset information.
 - Paragraph 10a(1), b(1): Added the upcoming change in the election window, effective 5 January 2023.
 - Paragraph 10b: Updated Education Office and USPFO responsibilities.
- Enclosure 8: Transfer of Education Benefit (TEB) Program
 - Paragraph 11f: Added IRR on Active Duty to the list of Authorized Exceptions, IAW AR 621-202.
- Numerous other administrative and formatting changes throughout the document.

TABLE OF CONTENTS

ENCLOSURE 1: GENERAL/OVERVIEW	5
ENCLOSURE 2: ACADEMIC INSTITUTION ACCESS	7
ENCLOSURE 3: TRAINING AND SYSTEM REQUIREMENTS	12
APPENDIX TO ENCLOSURE 3: SYSTEM APPLICATION PROCEDURES - BEAST	18
ENCLOSURE 4: MONTGOMERY GI BILL – SELECTED RESERVE (MGIB-SR)	20
APPENDIX 1 TO ENCLOSURE 4: CHAPTER 1606 ELIGIBILITY STATUS CODES.....	24
APPENDIX 2 TO ENCLOSURE 4: MANUAL PROCESSING PROCEDURES MGIB-SR	28
ENCLOSURE 5: MONTGOMERY GI BILL – SELECTED RESERVE KICKER	29
APPENDIX 1 TO ENCLOSURE 5: MGIB-SR KICKER ELIGIBILITY STATUS CODES	36
APPENDIX 2 TO ENCLOSURE 5: MANUAL PROCESSING PROCEDURES KICKER	40
ENCLOSURE 6: MONTGOMERY GI BILL – ACTIVE DUTY	41
ENCLOSURE 7: POST-9/11 GI BILL GUIDANCE	45
APPENDIX TO ENCLOSURE 7: ELIGIBILITY CHART FOR POST-9/11 GI BILL	50
ENCLOSURE 8: TRANSFER OF EDUCATION BENEFIT (TEB) PROGRAM	51
APPENDIX TO ENCLOSURE 8: SEPARATION COUNSELING FORM	61
ENCLOSURE 9: FEDERAL TUITION ASSISTANCE (FTA)	62
ENCLOSURE 10: CREDENTIALING ASSISTANCE (CA).....	65
ENCLOSURE 11: ARMY PERSONNEL TESTING (APT) PROGRAM.....	67
ENCLOSURE 12: EDUCATION SUPPORT PROGRAMS	69
ACRONYMS	71
GLOSSARY	74

ENCLOSURE 1: GENERAL/OVERVIEW

1. **Overview.** The ARNG VolEd policy is a consolidated document that provides policy and guidance for ARNG education programs and services.

2. **Applicability.** This policy applies to individuals who are entering into, are currently serving, or have previously served in the ARNG.

3. **Administration.**

a. **General.** This policy prescribes eligibility criteria, procedures, and standards for ARNG education staff to administer various ARNG education programs including; the Montgomery GI Bill-Selected Reserve (MGIB-SR), MGIB-SR Kicker, Montgomery GI Bill-Active Duty (MGIB-AD), Post-9/11 GI Bill, Transfer of Education Benefits (TEB), Federal Tuition Assistance (FTA), Credentialing Assistance (CA), and Army Personnel Testing (APT) programs.

b. **Management Controls.** Commanders at all levels are responsible for establishing and maintaining internal controls, for identifying and addressing major performance challenges, and for identifying areas that are at the greatest risk for fraud, waste, abuse, and mismanagement. Management control provisions shall be in accordance with AR 11-2, Managers' Internal Control Program. Alteration to eligibility documents will be treated as suspected fraud and thoroughly investigated to determine appropriate legal disposition.

c. **System Access.** State/Territory education staff must request the appropriate level of access to required systems and databases for the management of education programs. Refer to Enclosure 3 for a list of system requirements.

d. **Personal Identification Information (PII).** Daily operations in an education office require ARNG education staff to access PII for members and dependents of the ARNG while using a variety of databases. Every authorized user must always safeguard the confidentiality of such information to comply with the Privacy Act of 1974. When leaving your workstation, be sure to logoff each application and lock your computer for added security. See your system administrator for additional guidance and procedures.

e. **Separation of Duties.** Before eligibility for GI Bill benefits is approved, State education staff will submit eligibility recommendations using the Guard Information Management System (GIMS) or other-directed system/process. A member of the ARNG Education Support Center (ESC) will review the recommendation for accuracy and adherence to applicable DoD, HQDA and ARNG education policy.

f. Tier Evaluations. Tier evaluations is the process of reviewing an applicant's education credentials to determine their tier status/education level for enlistment into the armed forces. Personnel assigned to the State education office are not authorized to conduct tier evaluations. For the ARNG, the Recruiting and Retention Battalion (RRB) Executive Officer (XO) or Operations Officer (commissioned officer or civilian) are the only personnel authorized to perform tier evaluations.

g. Army Board of Corrections for Military Records (ABCMR). In accordance with AR 15-185, paragraph 2-5, ABCMR is the highest level of administrative review within the Department of the Army. Title 10 USC, Section 1552 gives Service Members (SMs) and veterans the right to apply to the ABCMR to correct military records, which include the following actions: correction or amendment of dates or terms of service in enlistment, accession, affiliation, reenlistment/extension, commission or appointment. The ABCMR requires that all administrative recourse or appeals be exhausted prior to submission of an ABCMR application. Public Law 506 (of the 81st Congress) requires that the request for correction of military records be submitted within three years after the error or injustice occurs, or within three years after discovering the error or injustice. Application procedures for the ABCMR can be found on their website: <http://arba.army.pentagon.mil/abcmr-overview.html>.

ENCLOSURE 2: ACADEMIC INSTITUTION ACCESS

1. **Overview.** This enclosure provides guidance on academic institution access to ARNG facilities. Template memorandums, access procedures, and other supporting documents on academic institution access are located in the [ARNG-Staff-Education Services Team ESO Channel](#) on MS Teams.

2. References.

a. Executive Order 13607, POTUS (Establishing Principles of Excellence for Academic institutions Serving Service Members, Veterans, Spouses, and Other Family Members), 27 April 2012.

b. Department of Defense Instruction (DoDI) 1322.25 (Voluntary Education Programs, Incorporating Change 3), 7 July 2014.

c. Department of Defense Instruction (DoDI) 1322.19 (Voluntary Education Programs Overseas Areas), 14 March 2013.

d. Department of Defense Instruction (DoDI) 1322.29 (Job Training, Employment Skills Training, Apprenticeships and Internships), 24 January 2014.

e. Department of Defense Instruction (DoDI) 1344.07 (Personal Commercial Solicitation on DoD Installations), 30 March 2006.

f. U.S. Army Regulation 621-5 (Army Continuing Education System, Rapid Action Revision), 6 September 2009.

g. Army Directive 2015-12 (Implementation Guidance for Credentialing Program and Career Skills Program), 11 March 2015.

h. U.S. Army Training and Doctrine Command (TRADOC) Policy Letter 13, TRADOC School/ Non-Commissioned Officer (NCO Academy) Guidance on Entering into Agreements with Civilian Colleges and Universities, 21 April 2014.

i. U.S. Army Human Resources Command memorandum (Educational Representative Access to Installations), 10 October 2013, rescinded upon publication of this memorandum.

j. U.S. Army Human Resources Command memorandum (Academic institution Access to Army Installations), 24 September 2014, rescinded upon publication of this memorandum.

3. **Administration.** States will publish guidance designating the State ESO as the primary point of contact (POC) for academic institution (AI) access.

a. **Compliance.** States/Territories/District will limit access to ARNG installations/facilities to only those institutions or their agents who are compliant with the DoD Voluntary Education Partnership Memorandum of Understanding (MOU). An installation is any Active Duty military, Reserve, or National Guard owned, leased, or operated base, reservation, post, site, camp, building, or other facility to which DoD personnel are assigned for duty. Agents representing education institutions in the performance of contracted services are permitted ARNG installation access only in accordance with the requirements of their contract and/or agreement.

b. **AI Access Request.** AIs and/or vendor organizations interested in providing education, guidance, training opportunities, and participating in sanctioned education fairs on a DoD Installation must submit a request via ArmyIgnitED. The ESO or other appointed designee in the education office will review the request and approve or deny access based on paragraph c and d below.

c. **AI Access Criteria.** Prior to granting AIs access to an ARNG Installation/Facility in order to provide services or education guidance to Soldiers, States/Territories/District will ensure they meet the following criteria:

(1) Have signed the DoD Voluntary Education Partnership MOU. A list of schools that have signed the DoD MOU is located at; <https://www.dodmou.com/>.

(2) Are in compliance with State/Territory/District authorization requirements consistent with regulations issued by the U.S. Department of Education, including Part 600.9 of Title 34, Code of Federal Regulations (CFR). AIs must meet the requirements of the State/Territory/District where services will be rendered to include compliance with all State/Territory/District laws as they relate to distance education. A link to the CFR is as follows; <https://www.ecfr.gov/current/title-34/subtitle-B/chapter-VI/part-600/subpart-A/section-600.9>.

(3) Are approved by the state for the use of Veterans' education benefits. A list of schools approved for veterans' education benefits are available at; <https://inquiry.vba.va.gov/weamspub/buildSearchInstitutionCriteria.do>.

(4) Are accredited by a national or regional accrediting body recognized by the U.S. Department of Education available at [the following URL: http://ope.ed.gov/accreditation/search.aspx](http://ope.ed.gov/accreditation/search.aspx).

d. **Approval/Disapproval of Requests.** The ESO or other appointed designee in the education office will review all academic institution requests for access to ARNG facilities on behalf of The Adjutant General (TAG). TAG, or their designated representative, has the final authority to approve, deny, suspend, or withdraw DoD Installation access permission from an institution, as deemed appropriate.

(1) Denial of Access to ARNG Installation/Facility. The ESO will deny DoD installation access to any institution that fails to meet the requirements outlined above. The ESO will provide a timely response regarding the denial in writing to the institution. If the reasons for denial are corrected, the institution may reapply for access.

(2) Institutions with Approved Access to ARNG Installation/facility. Institutions and their agents with approved access to DoD Installations will only advise or counsel Soldiers at locations approved by the State/Territory education advisor; and, will maintain a record of Soldiers counseled and provide a copy to the ESO prior to departing the event. The record will annotate the type of program and the status of the Soldier (potential, current or new student).

e. Monitoring of Academic Institutions. The ESO will continue to observe those institutions and their agents whom have been granted access to ARNG Installations/Facilities to provide education, guidance, training opportunities, and participate in sanctioned education fairs to Soldiers to ensure they:

(1) Adhere to federal law, DoD Instruction 1344.07, DoD Instruction 1322.19, and the DoD Installation policies and regulations;

(2) Comply with applicable DoD Installation policies and procedures designated by the Installation commander on such matters as fire and safety, environment, physical security, personnel background checks, vehicle inspection and registration, and any other applicable statutes or regulations designated by the Installation commander;

(3) Do not use unfair, deceptive, abusive or fraudulent devices, schemes, or artifices, including misleading advertising or sales literature;

(4) Do not engage in unfair, deceptive, or abusive marketing tactics, such as during unit briefings or assemblies; engaging in open recruiting efforts; or distributing marketing materials on the DoD Installation at unapproved locations or events. As part of efforts to eliminate unfair, deceptive, and abusive marketing aimed at Soldiers, institutions will:

(a) Ban inducements including any gratuity, favor, discount, entertainment, hospitality, loan, transportation, lodging, meals, or other items having a monetary

value of more than \$20 to any individual, entity, or its agents including third party lead generators or marketing firms other than salaries paid to employees or fees paid to contractors in conformity with all applicable laws for the purpose of securing enrollments of Soldiers or obtaining access to Tuition Assistance (TA) funds. Institution sponsored scholarships or grants and tuition reductions available to military students are permissible;

(b) Refrain from providing any commission, bonus, or other incentive payment based directly or indirectly on securing enrollments or federal financial aid (including TA funds) to any persons or entities engaged in any student recruiting, admission activities, or making decisions regarding the award of student financial assistance;

(c) Refrain from high-pressure recruitment tactics such as making multiple unsolicited contacts (3 or more), including contacts by phone, email or in-person, and engaging in same-day recruitment and registration for the purpose of securing Soldier enrollments;

(5) Market to, or recruit, newly assigned military personnel to the DoD Installation, unless the Soldier has received information about voluntary education programs and educational services available through the ARNG, to include TA, from their education services staff or as part of their orientation to the ARNG;

f. Conducting Courses/Instruction on Installations/Facilities. AIs desiring access to provide on-installation education programs must follow applicable ARNG installation policies and procedures, sign the DoD MOU, and meet the following guidelines:

(1) Sign a separate On-Installation Education Programs MOU (On-Installation MOU) to provide on-installation courses or degree programs;

(2) Comply with the requirements in the On-Installation MOU;

(3) Agree to coordinate degree programs offered on the ARNG Installation/Facility with the ESO, who will receive approval from TAG, or their designated representative, prior to opening of classes for registration ;

(4) Admit candidates to the institution's On-Installation programs at their discretion; however, priority for registration in DoD Installation classes will be given in the following order:

(a) DoD Service Members

(b) Federally funded DoD Civilian employees

(c) Eligible adult family members of Service Members and DoD civilian employees

(d) Military retirees

(e) Non-DoD personnel

(5) Provide the ESO with a tentative annual schedule of course offerings to ensure that the educational needs of the military population on the ARNG Installation/Facility are met and to ensure no course or scheduling conflicts with other On-Installation programs.

(6) Provide instructors who meet the criteria established by the institution to qualify for employment as a faculty member on the main administrative and academic center.

g. On-Installation MOU Review and Changes.

(1) Review: The ESO and authorized school representative will review the MOU periodically (at least every 5 years) to consider items such as current accreditation status, updated program offerings, and program delivery services.

(2) Modifications: Modifications to the MOU will be in writing and, except for those required due to a change in State/Territory/District or Federal law, will be subject to approval by both the ESO and authorized school representative.

(3) Signatures: The ESO or other designated representative appointed by the TAG, will sign the MOU. The academic institution determines the authorized school representative.

(4) Effective Date: The MOU is effective on the date of the later signature.

(5) Expiration Date: The MOU will expire 5 years from the effective date, unless terminated or updated prior to that in writing by the ESO or the academic institution.

(6) Cancellation: The ESO or the academic institution may cancel the MOU 30 days after receipt of the written notice from the cancelling party. In addition, the ESO may terminate and/or suspend an MOU with an academic institution for failure to follow any term of the MOU or misconduct as outlined at any time.

ENCLOSURE 3: TRAINING AND SYSTEM REQUIREMENTS

1. **Overview.** This enclosure provides guidance on training and automated system requirements for State education office staff.

2. **Training Courses.**

a. Education Services Basic Course – Distance Learning.

(1) Required Attendees: All newly assigned personnel to the state education office and all newly assigned Title 5, Education Services Specialists assigned to NGB.

(2) Frequency: Within 90-days of assignment. If an individual leaves the education office and returns after one year or later they must retake the course within 90-days of reassignment or the next available course.

Note: *The Education Services Basic Course DL Version is currently under revision.*

b. Education Services Course (EDU-ESC) – Resident.

(1) Required Attendees: All newly assigned personnel to the state education office and all newly assigned Title 5, Education Services Specialists assigned to NGB.

(2) Frequency: Within 180-days of assignment or the next available course. If an individual leaves the education office and returns after one year or later they must retake the course within 180-days of reassignment or the next available course.

(3) Required System Access: Guard Incentive Management System (GIMS), Interactive Personnel Electronic Records Management System (iPERMS), Defense Manpower Data Center-Benefits for Education Administrative Services Tool (DMDC-BEAST), Director's Personnel Readiness Overview (DPRO), and ArmyIgnitED.

(4) Removal of GIMS Access: Newly assigned education staff who have not completed the EDU-ESC will be granted temporary access to GIMS for up to 180 days from their date of assignment. Individuals who have still not completed the EDU-ESC after 180-days of assignment will have their GIMS access removed until completion of the course. Exceptions must be approved by the Chief, Education Services Branch.

c. GI Bill Manager Course (EDU-GIBMC) – Resident.

(1) Required Attendees: All newly assigned personnel required to perform or assist with GI Bill functions in the state education office to include NGB assigned, Title 5 Education Services Specialists.

(2) Frequency: Within 180-days of assignment or the next available course. If an individual leaves the education office and returns one year or later they must retake the course within 180-days of reassignment or the next available course.

(3) Required system access: GIMS, iPERMS, DMDC-BEAST, and DPRO.

(4) Removal of GIMS Access: Newly assigned education staff who have not completed the EDU-GIBMC will be granted temporary access to GIMS for up to 180 days from their date of assignment. Individuals who have still not completed the EDU-GIBMC after 180-days of assignment will have their GIMS access removed until completion of the course. Exceptions must be approved by the Chief, Education Services Branch.

d. Training location. Each resident course listed above is conducted at the Professional Education Center (PEC) Camp Robinson, Arkansas unless otherwise directed.

e. Course Details. Course registration information is available at: https://events.pec.ng.mil/EventRegistration/#_coursecatalog.

f. Enrollment Procedures.

(1) State ESOs provide training requirements for resident courses to the State Training Managers. Seats should be requested through the Training Request Arbitration Panel (TRAP) process two years in advance. Updated training seat requirements and requests are handled throughout the year. It is imperative that state ESO contact your State Army Training Requirements and Resources System (ATTRS) Quota Source Manager to TRAP training seats for future years.

(2) ATRRS must meet the minimum number of reservations for each course NLT 30 days prior to the course report date. Students in a wait status will roll into vacant seats 45-days prior to the start of the course. Anyone left in a wait status can request a reservation in a future class, provided the State has the available quotas.

g. Funding. PEC centralized funding is available for all federal full-time support personnel including: Active Guard Reserve (AGR), Title 32 Dual-Status Military Technicians (MilTechs) and Title 5, Department of the Army Civilians (state and federal). States are responsible for funding State employees, Active Duty for Operational Support (ADOS), and contract personnel. Refer to current PEC central funding guidance.

3. Additional Training Opportunities. Below are several additional (non-ATTRS) training opportunities available to state education office staff.

a. Annual ARNG Education Services Workshop. This annual workshop provides training and updates on ARNG education programs and services to state education staff. The National Guard Bureau Education Services Branch (ARNG-HRH-C) hosts the workshop. States are responsible for funding and may bring 2-3 attendees per state. The State ESO must contact the NGB Education Services Branch training

program manager and/or Branch Chief for additional attendee authorizations. This workshop is typically conducted in the April-May timeframe at the Professional Education Center (PEC).

b. Council of Colleges and Military Educators (CCME). This is an annual professional development symposium for personnel working in VoEd across the Department of Defense. States are responsible for funding selected attendees. More information on CCME is available at: <http://www.ccmeonline.org/>.

c. OSD Professional Development Institute (OSD PDI). This is an annual professional development event hosted by OSD for personnel working in VoEd across the Department of Defense. The event includes training for education counselors and ESOs as well as service specific training. States are responsible for funding selected attendees. More information on the OSD PDI is available at: <https://www.dantes.doded.mil/CounselorsReps/index.html>

d. NGB Hosted Training via MS Teams. The Education Services Branch (ARNG-HRH-C) hosts a monthly training webinar, a quarterly field call, and various other training opportunities for state education office staff. These events are held virtually on MS Teams in the [ARNG Staff-Education Services Team Training Channel](#).

e. ACCESS AU Hosted Training via MS Teams. ACCESS Army University (AU) hosts a monthly field call and various other training opportunities for Army education office staff. These events are held virtually on MS Teams in the [TR-CAC ArmyU ACCESS Field Call Channel](#).

f. DANTEs Hosted Training. DANTEs hosts a monthly field call and various other training opportunities for Army education office staff. These events are held virtually on various platforms. For additional information go to the DANTEs web site at: <https://www.dantes.doded.mil/>

g. State Assistance Visits (SAVs). The Education Services Branch (ARNG-HRH-C) conducts periodic virtual SAVs to each state/territory on a rotational and as needed basis. These visits are designed to assist State ESOs in the implementation of VoEd programs by identifying areas of improvement, providing recommendations, training and mentorship, and sustaining best business practices. The SAV schedule and checklist are posted on the [ESO Channel on MS Teams](#).

4. Training and Mentorship for New Personnel. To ensure a smooth transition to their positions, new ESOs and new GI Bill Managers are requested to complete the new ESO/GI Bill Manager Checklist within 90 days of assignment.

a. ESOs must complete Part I of the new ESO checklist located in the [ESO Channel in the ARNG Education Services Staff Team](#) and upload to the same location within 90 days (Part II should be completed within 120 days of arrival but is not required to be uploaded). The ESO Liaison at NGB will provide guidance and mentorship to all new ESOs and will monitor completion of the checklist.

b. GI Bill Managers. GI Bill Managers must complete the new GI Bill Manager checklist and upload the completed checklist to MS Teams. The GI Bill Program Manager will provide guidance and mentorship to all new GI Bill Managers and will monitor completion of the new GI Bill Manager checklist. The new GI Bill Manager checklist is located on the [GI Bill Manager channel on MS Teams](#).

c. Education Services Specialists (ESSs). Newly assigned NGB, Title 5, ESSs and SESSs will follow the guidance outlined in the NGB, Title 5, ESS Handbook.

5. Databases and Access. The primary databases state education staff will use on a regular basis to determine eligibility and administer ARNG education benefits and entitlements are listed below.

a. ArmyIgnitED: <https://www.armyignited.army.mil>. ArmyIgnitED is a digital platform that automates the Federal Tuition Assistance and Credentialing Assistance Programs for eligible Soldiers. To gain access to ArmyIgnitED, state education staff must request access through the NGB assigned, Title 5, regional Supervisory Education Services Specialist (SESS). Explanation of the roles in ArmyIgnitED are listed below.

(1) Ed Center - Contractor (View only access)

(2) Ed Center - Counselor (View student profiles, approve Education Goals, action help desk cases).

(3) Ed Center - ESS (View student profiles, create/defer holds, approve Education Goals, reject/approve TA, action help desk cases).

(4) Ed Center – ESO (View student profiles, create/defer holds, approve Education Goals, reject/approve TA, action help desk cases, review/approve Installation Access requests).

(5) Region ESO (Applies to SESSs only, view student profiles, create/defer holds, approve Education Goals, reject/approve TA, action help desk cases, create user accounts for state education staff).

b. ATRRS: <https://www.atrrs.army.mil/portals/logon.aspx>. The Army Training Requirements and Resources System (ATRRS) is a database used to verify completion of MOS training. Contact your State/Territory S-3, Operations Branch for “read only” access requirements.

c. BEAST: <https://beastapp-pki.dmdc.mil/beast>. The Benefits for Education Administration Services Tool (BEAST) is the primary DoD database which stores and transmits all service component GI Bill eligibility information to the Department of Veterans Affairs (DVA). The DVA uses this information to determine current payment eligibility for GI Bill benefits. To gain “read only” level access, users must complete the requirements listed in the appendix to this enclosure.

d. DPRO: <https://smms.ngb.army.mil/v3>. The Director's Personnel Readiness Overview (DPRO) is a primary database for State education staff which provides management reports and grades State/Territory performance of their management of the GI Bill and MGIB-SR Kicker programs. To gain "read only" access:

(1) Complete annual IA awareness training.

(2) Login and select G1 Data Portal (located on the right side of the page) to begin access request form for DPRO.

(3) Complete all requirements of the online request. This information will be reviewed personally by the Application Administrator to verify that you actually need access to the application, so be sure to describe your need thoroughly so the request can be approved and the appropriate permissions can be granted.

e. GIMS: <https://smms.ngb.army.mil/v3>. The Guard Information Management System(GIMS) GIMS is the database-of-record to record Soldier education counseling data, manage and administer GI Bill programs, and to process Legacy Federal Tuition Assistance (FTA) recoupment actions. GIMS management roles for state personnel are approved by NGB and include: State MGR: GI Bill-P (Primary); State Administrator; Incentive Manager (IM); Student Loan Repayment (SLRP) Manager and FTA-P. Subordinate roles are approved by the State Administrator. The GIMS Helpdesk can be used to resolve system errors and is available at: 1 (877) 339-5570 (M-F 0700-2000 EST) or via email at: ng.ncr.ngb-arng.mbx.rcms-g@army.mil .

(1) Access for ESOs. The annual SRIP annotates the GIMS access requirements and process for ESOs. In addition to those requirements, ESOs are also required to complete the Education Services Basic Course – Distance Learning, the Education Services Course – Resident, and the GI Bill Manager's Course. See para 3b(4) above for information pertaining to the removal of GIMS access for failure to complete required courses.

(2) Access for GI Bill Managers. The GIMS access requirements for the GI Bill Manager role (GI-P) role include completion of; the Education Services Basic Course – Distance Learning, the Education Services Course – Resident, the GI Bill Managers Course, or be scheduled to attend the ESC or GI Bill Manager course within six months of access request, Fiscal Law (FL) Course, and annual Information Assurance (IA) awareness training. See para 3c(4) above for information pertaining to the removal of GIMS access for failure to complete required courses.

(3) Access for Guidance Counselors/State ESSs. The GIMS access requirements for Guidance Counselors and state ESSs are managed by the GIMS state administrator. At a minimum, these individuals are required to complete the Education Services Basic Course v18 – Distance Learning, and the Education Services Course – Resident, (or scheduled to attend the ESC within six months of access request).

f. iPERMS: <https://iperms.hrc.army.mil/login/>. The Interactive Personnel Electronic Records Management System (iPERMS) is an online records repository, which stores eligibility documents used to determine eligibility for various education and incentive programs. Contact your State/Territory iPERMS Manager for access requirements.

g. IPPS-A: <https://ipps-a.army.mil/>. The Integrated Personnel and Pay System - Army (IPPS-A) modernizes Army Human Resources (HR) provides access to Soldier personnel and pay records to help education staff manage and administer education benefits and incentives. Contact your State/Territory IPPS-A Office to request access.

h. Microsoft (MS) Teams: MS Teams is a collaboration app that helps individuals stay organized and have conversations all in one place. It features instant messaging, audio and video calling, rich on line meetings, mobile experiences, and extensive web conferencing capabilities. The ARNG Education Services Branch maintains a public and private Team to provide education information and services to Soldiers and state education staff and to automate various processes. The staff team is located at: [ARNG Staff-Education Services](#) and the public team is located at: [ARNG Public-Education Services](#). The Education Services Branch also hosts a separate team for Army Personnel Testing called, [ARNG Army Personnel Testing](#). State education staff are highly encouraged to join each of the ARNG Education teams to ensure you stay up to date on ARNG education programs and services.

APPENDIX TO ENCLOSURE 3:
SYSTEM APPLICATION PROCEDURES - BEAST

1. **Overview.** The BEAST Application (<https://beastapp.dmdc.mil/beast>) provides the ability to research and resolve educational benefit program issues. BEAST contains information on the following educational benefit programs:

- a. Montgomery GI Bill - Active Duty (MGIB-AD) (Title 38 USC, Chapter 30.).
- b. Post-9/11 GI Bill (Title 38 USC, Chapter 33.).
- c. Transfer of Post-9/11 GI Bill Education Benefits (TEB) (Title 38 USC, Sec 3319.).
- d. Montgomery GI Bill - Selected Reserve (MGIB-SR) and MGIB-SR Kicker (Title 10 USC, Chapter 1606).
- e. Reserve Educational Assistance Program (REAP) (Title 10 USC Chapter 1607).
- f. National Call to Service (NCS) (Title 10 USC, Section 510).

2. **Application Submissions.** All BEAST access requests must be submitted via the [GI Bill Channel in MS Teams](#). Questions pertaining to the application submission process should be addressed to the ARNG Site Security Manager (SSM) and NGB GI Bill Program Manager, Mr. Donald Sutton at: donald.e.sutton.civ@army.mil.

3. **Document Requirements.** All requests for access to the BEAST application must include the following supporting documentation. NGB will return, without action, all applications not including all required documents.

- a. A completed DD Form 2875 System Authorization Access Request (SAAR), signed electronically by the requestor and State Education Services Officer (ESO)/Supervisor with the reason the requestor requires access and the requestor's DoD ID number recorded in the comments section.

- b. A copy of the requestor's most recent Information Assurance (IA) training certificate, completed less than one year prior to the access request.

4. **User Access.** There are 4 levels of user access.

- a. Read Only. "Read-Only" access is assigned to users at the state level for research and verification purposes. These users will not be able to modify records.

b. Edit. Users assigned to NGB and the Education Support Center (ESC) are the only authorized users with permissions to make modifications to records in the BEAST Application and approve or reject TEB requests.

c. Surrogate. Surrogate access allows a user to initiate, modify, or revoke a TEB request on behalf of a separated Soldier. No more than three members of the ARNG Education Support Center will be granted Surrogate access.

d. Super User. Super User access allows a user to transfer months to Colmery-eligible dependents. The NGB PM, one member of the ESC, and two alternates will have Super User access.

5. **Safeguarding information.** Only users authorized by the ARNG Site Security Manager (SSM) may access or view information in the BEAST Application. Every authorized user must safeguard the confidentiality of such information at all times to comply with the Privacy Act of 1974.

6. **Personnel changes.** State ESOs are responsible for notifying the ARNG BEAST SSM of any out-going personnel in order to ensure BEAST access removal. Inactivity of 30 days triggers an automatic account lock. Email the Site Security Manager at the address in paragraph 2a to request an account be unlocked. Inactivity of 90 days or more triggers account suspension.

ENCLOSURE 4:
MONTGOMERY GI BILL – SELECTED RESERVE (MGIB-SR)

1. **Overview.** The MGIB-SR program is an educational assistance entitlement provided for the Selected Reserve (SR). This entitlement encourages the enlistment and retention of quality applicants and Service Members (SMs) into the SR.

2. **References.**

a. Title 10, United States Code (USC), Section 16131-16136, Chapter 1606 – Educational Assistance for Members of the Selected Reserve (SELRES).

b. Department of Defense (DoD) Instruction 1322.17, Montgomery GI Bill Selected Reserve (MGIB-SR), 15 January 2015.

c. Department of Defense (DoD) Instruction 1336.08, Military Human Resource Records Life Cycle Management, 13 November 2009.

d. Army Regulation (AR) 621-202, Army Educational Incentives and Entitlements, 26 September 2017.

e. Department of Defense Manual (DoDM) 7730.54, Volume 1, Reserve Components Common Personnel Data System (RCCPDS): Reporting Procedures, Enclosure 8, RC Active Service Transaction File, 25 May, 2011.

f. Department of Defense Manual (DoDM) 7730.54-M Volume 2, Reserve Components Common Personnel Data System (RCCPDS): Domain Values for Reserve Component (RC) Personnel Reports, 25 May 2011.

g. Memorandum, Clarification Regarding Concurrent Receipt of Federal Tuition Assistance and the Montgomery GI Bill-Selected Reserve Education Benefits, 4 May 2021

3. **Funding Authority.** The authority to execute MGIB-SR education entitlement is subject to authorization in law, appropriation of funds, and applicable regulatory guidance.

4. **Eligibility Criteria.** Eligibility for the MGIB-SR may be established only one time in a SM's career. A member of the SELRES establishes eligibility for the MGIB-SR basic benefit when they:

a. Enlist, reenlist or extend in the SR on or after 1 July 1985, for not less than six years or, in the case of an officer, signs a DA Form 5447 agreeing to serve in the SR for six years, in conjunction with any other period of obligated service;

- b. Complete the requirements for a high school diploma or equivalent certificate;
 - c. Complete initial active duty training (IADT) requirements. Enlisted personnel must complete Basic Combat Training (BCT) and Advanced Individual Training (AIT) or equivalent and be awarded an MOS. Officers who did not complete IADT prior to commissioning must be branch qualified. The primary method to identify IADT completion is the course end date located in Army Training Requirements Reporting System (ATRRS). Use DD Form 214 or DA Form 1059 when ATRRS data is unavailable.
5. **Eligibility Start Date.** MGIB-SR eligibility is established when all the requirements in paragraph four have been met. For a list of eligibility status codes and eligibility status effective dates, see Appendix to Enclosure 4.
6. **Period of Entitlement.** The period of entitlement for the MGIB-SR is based on the date basic entitlement was established, as follows:
- a. 1 July 1985 to 30 September 1992. Eligibility expires upon completion of the 10-year period that began on the date the MGIB-SR basic entitlement was established; separation from the SR during that 10-year period; or violation of termination criteria outlined in paragraph 6 of the Appendix to Enclosure 4, whichever comes first; or
 - b. 1 October 1992 to 29 June 2008. Eligibility expires upon completion of the 14-year period that began on the date the MGIB-SR basic entitlement was established; separation from the SR during that 14-year period; or violation of termination criteria outlined in paragraph 6 of the Appendix to Enclosure 4, whichever comes first; or
 - c. 30 June 2008 to present. Eligibility expires on the date the SM separates from the SR; or upon violation of termination criteria outlined in paragraph 6 of the Appendix to Enclosure 4, whichever comes first.
 - d. SMs discharged due to a disability will receive the period of entitlement outlined in paragraph 3.c. of the Appendix to Enclosure 4.
 - e. A SM who is ordered to active duty in accordance with Title 10 USC Sections 12301(a), 12301(d), 12301(g), 12302, 12304, 12304a, or 12304b with a date of MGIB-SR basic entitlement before 30 June 2008 will have the period of entitlement extended for the period of active duty, plus four months.
 - f. Deployed SMs remain eligible to receive MGIB-SR payments.
 - g. Involuntarily separated SMs between 1 Oct 1991 and 31 Dec 2001 or between 1 Oct 2007 and 30 Sep 2014 due to unit inactivation or involuntary separation due to a reduction in force initiative will retain eligibility for the MGIB-SR for the remainder of their period of eligibility described in this paragraph.

h. If a SM's current education term ends after being discharged or separated, the DVA may continue to pay the SM through the end of that educational term, provided the SM is otherwise eligible.

7. Recoupment/Overpayment. The DVA and Defense Finance and Accounting Service (DFAS) will recoup any unauthorized MGIB-SR payments.

a. Recoupment. SMs who receive MGIB-SR payments and lose entitlement status due to unsatisfactory participation or non-completion of their six-year military service obligation may be required to refund part of the education assistance received plus accrued interest. The DVA initiates recoupments and DFAS processes debt repayment. The recoupable amount is based on a formula prescribed by the DoD.

b. Overpayment. An overpayment occurs when a SM received MGIB-SR payments that he/she was not authorized to receive. An overpayment debt letter is initiated, and the overpayment is collected by the DVA.

8. Duplication of Educational Assistance

a. Selected Reserve Members may concurrently receive MGIB-SR and FTA when enrolled half-time or more.

b. Concurrent use of MGIB-SR and State tuition programs is authorized unless prohibited by state specific guidelines as concurrent use is not a duplication of benefits;

c. For the purposes of benefit payments, MGIB-SR includes MGIB-SR basic benefit and Kicker, when a SM is eligible to receive Kicker payments.

d. For a SM who qualifies for two or more GI Bill programs, the maximum allowable entitlement for DVA-administered educational benefits is 36 months from any one program, and a maximum of 48 months from all programs.

e. Per ACCESS AU policy, a SM cannot receive MGIB benefits and Credentialing Assistance for the same expenses. However, if ACCESS AU does not fund an examination a SM can request reimbursement from the VA for the test as long as ACCESS AU did not pay for it.

9. Eligibility Processing. The State GI Bill Manager must submit MGIB-SR recommendations in GIMS to change the MGIB-SR status code according to instructions in the GI Bill Manager's Handbook. In the event that GIMS is not functional, manual processing procedures may be authorized by the Chief, Education Services Branch. Manual processing procedures for MGIB-SR are located in Appendix 1 of Enclosure 4.

10. **Administrative Errors.** MGIB-SR eligibility errors due to incorrect IPPS-A coding, inaccurate orders, or missing documents in iPERMS or GIMS should be addressed at the state level by correcting the data in IPPS-A and/or submitting a MGIB-SR recommendation in GIMS per the Appendix to Enclosure 4.

11. **VA Reverse Inquiries.** If the state discovers a Soldier's eligibility status has been incorrectly determined by the VA, they may submit a reverse inquiry to the ARNG ESC. Submit SM Approval/Denial Certificate of Eligibility (COE) via the [GI Bill Manager Channel on MS Teams](#)

12. **Transfer of Benefits.** The transfer of MGIB-SR benefits to a spouse or dependents is not authorized.

APPENDIX 1 TO ENCLOSURE 4:
CHAPTER 1606 ELIGIBILITY STATUS CODES

1. **Overview.** The State GI Bill Manager identifies and recommends Eligibility Status Code (ESC) changes to a SM's MGIB-SR entitlement in accordance with (IAW) law, regulation, this policy, and the GI Bill Manager Handbook. The Eligibility Status EffectiveDate (ESED) is the date that each ESC takes effect.

2. **Ineligible.** The State GI Bill Manager must submit an MGIB-SR recommendation in GIMS to change the MGIB-SR status to an ineligible code ("A" code) for any of the following reasons:

a. AA – No Entitlement. SM has not executed a qualifying, six-year SELRES contract or service obligation with any RC on/after 1 July 1985.
ESED = Date of entry into the ARNG.

b. AB – No Entitlement. SM executed a qualifying, six-year SELRES contract or service obligation with the ARNG on/after 1 July 1985, but has not completed IADT.
ESED = Date SM signed the six-year contract.

c. AC – No Entitlement. SM executed a qualifying, six-year SELRES contract or service obligation with the ARNG on/after 1 July 1985 but has not completed the requirements of a secondary school diploma or equivalency certificate.
ESED = Date SM signed the six-year contract.

d. AD – No Entitlement. SM erroneously reported as eligible with the ARNG.
ESED = Date of entry into the ARNG.

3. **Eligible.** The State GI Bill Manager must submit an MGIB-SR recommendation in GIMS to change the MGIB-SR status to an eligible code ("B" code) for any of the following reasons:

a. BA – Eligible. SM is serving in an initial qualifying period of eligibility.
ESED = Day of completion of all eligibility criteria. If IADT or BOLC completion is the final eligibility criteria completed, eligibility will begin the following day. When a BA code is established, State GI Bill Managers will:

(1) Issue a DD Form 2384-1, Notice of Basic Eligibility (NOBE) within 30 days;

(2) Place the NOBE on file in the SM's iPERMS as required in DoDI 1336.08.

b. BB – Eligibility Reinstated (after suspension). SM is serving in a second or subsequent qualifying period of eligibility.

ESED = Date SM returns from period of authorized non-availability (Inactive National Guard (ING) or Individual Ready Reserve (IRR)).

c. BE – Eligibility Retained. SM separated from the SR because of a disability incurred on or after the date the SM established eligibility for the MGIB-SR and was not the result of willful misconduct.

ESED = Date SM was medically discharged with state discharge orders. The SM will retain eligibility, provided the SM was otherwise eligible for MGIB-SR benefits on the date of separation, according to the following rules:

(1) For a SM who established eligibility prior to 30 June 2008, eligibility expires upon completion of the period of entitlement described in paragraph 6.a. or 6.b. of this enclosure.

(2) For a SM who established eligibility on or after 30 June 2008, eligibility expires upon completion of the 14-year period that began on the date of separation from the SR.

4. **Suspension**. A SM is authorized one period of absence (break in service) and may either transfer to the IRR, ING or may transfer to another Reserve Component. The State GI Bill Manager must submit an MGIB-SR recommendation in GIMS to change the MGIB-SR status to a suspended code (“C” code) for any of the following reasons:

a. CB – Eligibility Suspended. SM transferred from the SELRES to the ING or IRR for reasons other than to fulfill a religious missionary obligation, for a maximum of 12 months.

ESED = Effective date of transfer orders into ING or IRR.

b. CC – Eligibility Suspended. SM transferred from the SELRES to the ING or IRR to fulfill a religious missionary obligation, for a maximum of 36 months.

ESED = Effective date of transfer orders into ING or IRR.

c. CD – Eligibility Suspended. SM awaiting final determination of unsatisfactory participation (absent from drills or Annual Training only).

ESED = Date of ninth unexcused absence within a 12 month period or first day of missed Annual Training.

d. CF – Eligibility Suspended. SM entered AGR program.

ESED = Date SM entered AGR program. This is not considered a break in service.

e. CG – Eligibility Suspended. SM is in receipt of a ROTC Scholarship under Title 10 USC, Section 2107. These are often referred to as Dedicated Guard or Minuteman Scholarships.

ESED = Date SM signed a Title 10 USC, Section 2107 scholarship contract. MGIB-SR entitlement suspended under this rule will not be reinstated if the Scholarship is

completed on/after 15 Jan 2015. Receipt of a ROTC Scholarship under Title 10 USC, Section 2107a does not impact MGIB-SR entitlement.

5. Reinstatement from Suspension. When certain conditions are met, the State GI Bill Manager must submit an MGIB-SR recommendation in GIMS to change the following MGIB-SR ESC to the appropriate eligible code ("B" code):

a. CB. When the SM returns to the SR within 12 months from a first authorized break in service, the ESC changes to BB.

ESED = Date SM returns from period of authorized non-availability (ING or IRR). If the break in service occurred during the MGIB-SR six-year contractual obligation, the SM must extend within one year of return for a period equal to or greater than the time not served in the SELRES in a drilling status during the contractual obligation, or MGIB-SR entitlement will be terminated per paragraph 6e of this enclosure.

b. CC. When the SM returns to the SR within 36 months from a first authorized break in service to complete a religious missionary obligation, the ESC changes to BB. ESED = Date SM returns from period of authorized non-availability (ING or IRR). If the break in service occurred during the MGIB-SR six-year contractual obligation, the SM must extend within one year of return for a period equal to or greater than the time not served in the SELRES in a drilling status during the contractual obligation, or MGIB-SR entitlement will be terminated per paragraph 6e of this enclosure.

c. CD. When the SM is determined to be a satisfactory participant through the appeal process or after a command decision, the ESC reverts to the code in effect prior to suspension (BA or BB).

ESED = the ESED in effect prior to suspension. If the CD suspension occurred during the MGIB-SR six-year contractual obligation, no extension is required.

d. CF. When the SM returns to a drilling status from AGR, the ESC reverts to the ESC in effect prior to suspension (BA or BB).

ESED = the ESED in effect prior to suspension. If the AGR duty occurred during the MGIB-SR six-year contractual obligation, the SM must extend within one year of return for a period equal to or greater than the time not served in the SELRES in a drilling status during the contractual obligation, or MGIB-SR entitlement will be terminated per paragraph 6e of this enclosure.

e. CG. When a SM completes a ROTC Scholarship under Title 10 USC, Section 2107 PRIOR to 15 January 2015, and the ESC reverts to the ESC in effect prior to suspension (BA or BB).

ESED = The ESED in effect prior to suspension.

6. **Termination.** The State GI Bill Manager must submit a MGIB-SR recommendation in GIMS to change the MGIB-SR status to a termination code (“D” code) for any of the following reasons:

a. DA – Not used.

b. DB – Eligibility Terminated. After completion of the six-year contractual service obligation, SM is discharged (Civilian Break); failed to re-affiliate from the ING or IRR to the SELRES within the required time limit (12/36 months); or has a second break in service for any reason.

ESED = Effective date of discharge order or transfer to the IRR or ING.

c. DC – Eligibility Terminated. SM is deceased.

ESED = Date of death.

d. DD – Eligibility Terminated. SM is determined to be an unsatisfactory participant.

ESED = Date of ninth unexcused absence or first missed day of Annual Training.

e. DE – Eligibility Terminated. SM has not completed the six-year contractual obligation and is discharged (civilian break); failed to extend after returning to the SELRES per paragraph 5a, 5b or 5d of this enclosure; failed to re-affiliate from the ING or IRR to the SELRES within the required time limit (12/36 months); or SM has a second break in service for any reason.

ESED = Effective date of discharge order or transfer to ING or IRR.

APPENDIX 2 TO ENCLOSURE 4:
MANUAL PROCESSING PROCEDURES, MGIB-SR

1. In the event GIMS is not functional, manual processing procedures may be authorized by the Chief, Education Services Branch. Manual processes are located in the [GI Bill Programs channel](#) in the ARNG Staff-Education Services team on MS Teams. For detailed information on manual processing procedures refer to the GI Bill Manager's handbook.

 2. To process Chapter 1606 and Kicker Recommendations use the '1606 & Kicker Recommendations' tab.
 - a. All applicable fields must be filled in with accurate, researched information.
 - b. Source documents must be in the SMs iPERMS OR uploaded as a part of the request.
 - c. Place comments to be added to GIMS in the request.
 - d. Monitor the request regularly in case follow-up documents or information is needed.
 - e. Completed cases will be placed in the GI Bill channel in Teams under files>01 Manual Processing>Completed Cases.
-

ENCLOSURE 5:
MONTGOMERY GI BILL – SELECTED RESERVE KICKER

1. **Overview.** The Montgomery GI Bill – Selected Reserve (MGIB-SR) Kicker is an educational assistance supplement that is available to promote accessions and retention in the SELRES to those members serving in critical specialties, skills, or units. Military Entrance Processing Station (MEPS) Guidance Counselors (GC) issue NPS Kickers through the Guidance Counselor Resource Center (GCRC). PS Kickers are issued by a GC at MEPS or by a Reserve Component Career Counselor (RCCC). Authorized personnel issue all other Kickers through GIMS. The MGIB-SR Kicker provides an educational allowance in addition to the GI Bill basic benefit. Title 10 USC, Section 16131 and DoDI 1322.17 authorizes the MGIB-SR Kicker.

2. **References.**

a. Title 10, United States Code (USC), Section 16131-16136, Chapter 1606 – Educational Assistance for Members of the SELRES.

b. Department of Defense (DoD) Instruction 1322.17 (Montgomery GI Bill Selected Reserve (MGIB-SR)), 15 January 2015.

c. Department of Defense (DoD) Instruction 1336.08 (Military Human Resource Records Life Cycle Management), 13 November 2009.

d. Army Regulation (AR) 621-202 (Army Educational Incentives and Entitlements), 26 September 2017.

e. Army Regulation (AR) 601-210 (Regular Army and Reserve Components Enlistment Program), 31 August 2016.

f. Department of Defense Manual (DoDM) 7730.54, Volume 1, Reserve Components Common Personnel Data System (RCCPDS): Reporting Procedures, Enclosure 8, RC Active Service Transaction File, 25 May, 2011.

g. Department of Defense Manual (DoDM) 7730.54-M Volume 2, Reserve Components Common Personnel Data System (RCCPDS): Domain Values for Reserve Component (RC) Personnel Reports, 25 May 2011.

3. **Period of Entitlement.** A SM may receive MGIB-SR Kicker payments for up to 36 months or until MGIB-SR or MGIB-AD eligibility is exhausted, whichever comes first.

4. **Eligibility Criteria.** Below are the criteria for an ARNG applicant or Soldier to establish eligibility for the MGIB-SR Kicker incentive. A Soldier may only establish eligibility for one MGIB-SR Kicker in his/her career.

a. Has not previously established eligibility for a MGIB-SR Kicker in any Reserve Component;

- b. Is currently eligible or is establishing eligibility for MGIB-SR or MGIB-AD;
- c. Enlists, reenlists, or extends an enlistment to commit to a six-year service obligation. A Soldier who has six or more years remaining until their Expiration Term of Service (ETS) does not need to extend. SM must have a concurrent six-year service obligation from the effective date of the MGIB-SR Kicker contract.
- d. Before receiving payment, the SM must complete:
 - (1) The requirements for a secondary school diploma or an equivalency certificate (Tier 1 or Tier 2);
 - (2) MOS or Area of Concentration (AOC) branch qualification.

5. **Eligibility Start Date.** Once the Soldier meets all the requirements in paragraph four, MGIB-SR Kicker eligibility is established. For a list of eligibility status codes and eligibility status effective dates, see the appendix to this enclosure.

6. **Types of Kickers.** Below are the Kickers available, the rates, and the criteria to qualify for each kicker.

a. **Non-Prior Service - \$350.**

- (1) Armed Services Vocational Aptitude Battery (ASVAB) Test Score Category (TSC) I-III A (50 or above).
- (2) Possess a high school diploma or equivalent (Education Tier Level 1 or 2).
- (3) Enlisting into a critical skill or unit. A critical skill or unit is any MOS in a MTOE or authorized TDA unit IAW current SRIP policy scored as an AUVS Tier Level 1-7 position.
- (4) Includes Civilian Acquired Skills Program (CASP) or Split-Training Option. Does not include Glossary NPS.

b. **Prior Service - \$350.**

- (1) ASVAB/Armed Forces Classification Test (AFCT) TSC I-III A (50 or above).
- (2) Grade E7 or below.
- (3) Duty Military Occupational Specialty Qualified (DMOSQ) in contracted MOS.
- (4) If enlisting from a branch of service other than Army, meet the requirements to be awarded the contracted MOS at the time of enlistment/affiliation. Eligibility will not be established until coded DMOSQ in IPPS-A.

c. Reenlistment - \$350.

(1) Must have completed three consecutive years of service in the ARNG. Soldiers who do not have three consecutive years of service in the ARNG may reenlist for the MGIB-SR Kicker up to one year prior to their ETS date, however, the effective date of the Kicker will not be until the Soldier has completed three years and the Soldier must have six years remaining on their enlistment contract.

(2) Have not completed more than 14 total years of service at the time of signing the addendum.

(3) ASVAB or Armed Forces Classification Test (AFCT) TSC I-III A (50 or above).

(4) Grade E7 or below.

(5) DMOSQ in contracted MOS.

d. Standard Officer (SOK) - \$350.

(1) Accept commission into the ARNG regardless of commissioning source. All officers who have not previously contracted for a Kicker are eligible for the SOK, including Direct Commissioned Officers and Officers without a Bachelor's Degree.

(2) Sign a DA Form 5447 Officer Service Agreement (OSA), agreeing to remain in the ARNG for six years.

(3) Complete the NGB Form 5435 on the same date as the DA 5447, and no later than one year after commissioning or recommissioning (Note: recommissioning must have been into a different area of concentration and/or branch).

(4) The Officer must complete the requirements for Branch Qualification before being eligible to receive payment.

e. Officer Candidate School (OCS) - \$350.

(1) Have completed IADT and been awarded an enlisted MOS.

(2) Enrolled into the OCS program and been awarded 09S MOS.

(3) Have not commissioned.

(4) Complete the DA 4836 and NGB Form 5435.

(5) The Candidate must complete OCS and accept a commission in the ARNG to retain this incentive.

f. Reserve Officers Training Corps (ROTC) - \$350.

(1) Have completed IADT and been awarded an enlisted MOS.

(2) Enrolled into the ROTC program and been awarded 09R MOS.

(3) Have not received a ROTC Scholarship under Title 10, Section 2107.

(4) Have not commissioned.

(5) Complete a Simultaneous Membership Program Agreement (NGB Form 594-1) and ROTC Cadet Contract (DA Form 597 Series).

(6) Complete the DA 4836 and NGB Form 5435.

(7) The Cadet must complete ROTC and accept a commission in the ARNG to retain this incentive.

g. Warrant Officer Candidate (WOC) - \$350.

(1) Have completed IADT and been awarded an enlisted MOS.

(2) Entered the WOC program and been awarded 09W MOS.

(3) Have not commissioned.

(4) Complete the DA 4836 and NGB Form 5435.

(5) The Candidate must complete Warrant Officer Candidate School and accept a position as a warrant officer in the ARNG to retain this incentive.

h. Officer Supplemental (Bump-Up) - \$350. This Kicker is not a new Kicker contract, it is a rate increase for an existing MGIB-SR Kicker issued at a lower amount to increase the rate to \$350.

(1) SM must have established eligibility and be currently eligible for an Accessions or Current Guard Kicker at the \$100 or \$200 rate.

(2) Enter either the OCS, ROTC, or WOC Officer Commissioning Program or accept a commission in the ARNG.

(3) Awarded 09S (OCS), 09R (ROTC), or 09W (WOC) as Duty MOS.

(4) Sign the MGIB-SR Kicker Supplemental addendum (NGB Form 5435-1) no later than one year after commissioning.

(5) If the SM has completed the six-year obligation for the original MGIB-SR Kicker, no additional service is required.

(6) If the SM has not completed the six-year obligation, the SM must complete the balance of the obligation to retain the higher Officer Supplemental rate. An OSA is not required.

(7) The Officer Candidates must complete the Commissioning Program and accept commission in the ARNG to retain the higher Supplemental rate.

7. Transfers.

a. If the SM has completed their initial six-year service obligation for their originally contracted MGIB-SR Kicker MOS prior to a transfer, the MGIB-SR Kicker remains valid regardless of new MOS/Unit/State.

b. The MGIB-SR Kicker contract will be terminated if the SM voluntarily transfers to another MOS prior to the completion of their initial six-year service obligation. Exceptions are entering the AGR, Military Technician (MILTECH), or Officer Commissioning Programs, or mobilization.

c. If the SM is involuntary transferred or reassigned within ARNG prior to the completion of their initial 6-year service obligation due to the following reasons, the SM will retain their MGIB-SR Kicker:

(1) A direct result of MOS reclassification;

(2) Transfer to another position or unit at the convenience of the government or unit deactivation, reorganization or relocation;

(3) When a change in MOS results, a Soldier must become qualified in the new MOS within 24 months of the transfer.

(4) When cross-leveling due to mobilization. The SM must either return to their contracted MOS or become qualified in the new MOS within 24 months of REFRAD.

8. Eligibility Processing.

a. Accurate reporting of MGIB-SR Kicker information is a mandatory requirement of the Army Auditing Agency (AAA). GIMS is the official Education and Incentive data tracking system for the ARNG. Prior to enlisting, reenlisting, extending, or signing an OSA, States are required to enter the MGIB-SR Kicker contract information into the management system upon the request for a control number.

b. Status changes. The State GI Bill Manager is responsible for managing the various status changes, which occur to a Soldier's MGIB-SR Kicker according to instructions in the GI Bill Manager's Handbook. GI Bill Managers will promptly enter accurate status changes into the Personnel Data System in order to meet statutory requirements. The GI Bill Manager must use GIMS on a daily basis and become familiar with its various management functions so that it will help to identify, record, and track MGIB-SR Kicker status changes.

c. In the event that GIMS is not functional, manual processing procedures may be authorized by the Chief, Education Services Branch. Manual processing procedures for the MGIB-SR Kicker are located in Appendix 2 of this Enclosure.

9. Period of eligibility.

a. Benefits End Date. Soldiers remain eligible for the MGIB-SR Kicker as long as they remain in a drilling status and meet the eligibility criteria of their contract or until entitlement is exhausted.

b. Mobilization Extension. The MGIB-SR Kicker payments correlate with payment of the 'Soldier's basic MGIB-SR benefit. If MGIB-SR eligibility is extended beyond the member's ETS due to a mobilization, the MGIB-SR Kicker will be extended for the same period.

c. Medical. ARNG MGIB-SR Kicker eligible Soldiers medically discharged due to a disability incurred through no misconduct of the Soldier will remain eligible for MGIB-SR Kicker benefits IAW Appendix to Enclosure 5, paragraph 3c.

d. Termination. Soldiers lose their eligibility for benefits on the date of termination and will not be reinstated IAW Appendix to Enclosure 5, paragraph 6.

10. Method of Payment. The Department of Veterans Affairs makes GI Bill payments. A Soldier enrolled full-time may receive up to 36 monthly payments in conjunction with basic GI Bill benefit payments. Payments for less than full-time enrollment are prorated based on the rate of pursuit. The amounts are valid for the entire term of the contract, regardless of future increases or decreases, unless the Officer/Soldier violates the terms of the MGIB-SR Kicker contract.

11. **Incentive Combinations.** Unless specifically prohibited by the current SRIP, the MGIB-SR Kicker is authorized to be combined with all other incentives. See the current SRIP for guidance on which incentives are authorized or prohibited to be issued in combination with the MGIB-SR Kicker.

12. **Recoupment/Overpayment.** The DVA and Defense Finance and Accounting Service (DFAS) will recover any unauthorized MGIB-SR payments.

a. Recoupment. SMs who receive MGIB-SR Kicker payments and lose entitlement due to unsatisfactory participation or non-completion of six-year military service obligation may be required to refund part of the education assistance received plus accrued interest. The DVA initiates debt GI Bill/ and Kicker recoupment. DFAS processes DVA debt recoupments. The recoupable amount is based on a formula prescribed by the DoD.

b. Overpayment. An overpayment occurs when a SM received MGIB-SR payments that he/she was not authorized to receive. The DVA initiates communication and recoupment actions to the overpaid SM and dependent if applicable.

13. **Administrative Errors.** State-level Administrative Correction Requests (ACRs) submitted in GIMS must be submitted IAW the appendix to this enclosure and/or the GI Bill Manager's Handbook. ACRs correct the following issues:

- a. MGIB-SR Kicker eligibility errors due to incorrect IPPS-A coding;
- b. Inaccurate orders or missing documents in iPERMS or GIMS.

14. **Exception to Policy Process.** Information on how to submit an Exception to Policy (ETP) for the MGIB-SR Kicker is located in the GI Bill Manager's Handbook. ETPs will be requested and processed in the [GI Bill Programs channel](#) located in the ARNG Staff-Education Services team on MS Teams.

- a. ETPs require the following documents:
 - (1) A statement from the Soldier
 - (2) A statement from the Soldier's Commander
 - (3) A statement from the ESO
 - (4) Any other documentation not available in iPERMS to support the ETP
- b. Complete the form in Teams and upload the documents
- c. When the ETP is returned, follow the directions on the approval/disapproval memo.

APPENDIX 1 TO ENCLOSURE 5:
MGIB-SR KICKER ELIGIBILITY STATUS CODES

1. **Overview.** The State GI Bill Manager identifies and recommends Eligibility Status Code (ESC) changes to a SM's MGIB-SR Kicker IAW this policy and the GI Bill Manager Handbook. The Eligibility Status Effective Date (ESED) is the date that each ESC takes effect.

2. **Ineligible.** The State GI Bill Manager must submit an MGIB-SR Kicker Administrative Correction Request (ACR) in GIMS to change the Kicker status to an ineligible code ("A" code) for any of the following reasons:
 - a. AA – Not used.

 - b. AB – No Entitlement. SM executed a qualifying, six-year SELRES contract or service obligation with the ARNG on/after 1 July 1985, but has not completed IADT. ESED = Date SM signed the six-year contract.

 - c. AC – No Entitlement. SM executed a qualifying, six-year SELRES contract or service obligation with the ARNG on/after 1 July 1985, but has not completed the requirements of a secondary school diploma or equivalency certificate. ESED = Date SM signed the six-year contract.

 - d. AD – No Entitlement. SM erroneously reported as eligible with the ARNG. ESED = Date of entry into the ARNG. For Soldiers whose Kicker addendum is missing, code records AD pending recovery of the addendum or approval of an ETP.

3. **Eligible.** The State GI Bill Manager must submit an MGIB-SR Kicker ACR in GIMS to change the Kicker status to an eligible code ("B" code) for any of the following reasons:
 - a. BA – Eligible. SM is serving in an initial qualifying period of eligibility. ESED = The day all eligibility criteria are complete. If IADT or Branch Qualification is the final criteria completed, eligibility will begin the following day. When eligibility is established, State GI Bill Managers will process an ACR to change the eligibility status code to BA.

 - b. BB – Eligibility Reinstated (after suspension). SM is serving in a second or subsequent qualifying period of eligibility. ESED = Date SM returns from period of authorized non-availability, ING or IRR.

 - c. BE – Eligibility Retained. SM separated from the SR because of a disability incurred on or after the date the SM established eligibility for MGIB-SR Kicker and was not the result of willful misconduct. ESED = Date SM was medically discharged with state discharge orders.

The MGIB-SR Kicker may be continued or extended under the same circumstances and for the same periods as the basic MGIB-SR entitlements. These circumstances are outlined in Appendix to Enclosure 4, Para 3c.

4. **Suspension.** A SM is authorized one period of absence (break in service) and may either transfer to the IRR, ING or may transfer to another Reserve Component. The State GI Bill Manager must submit an MGIB-SR Kicker ACR in GIMS to change the Kicker status to a suspended code (“C” code) for any of the following reasons:

a. CB – Eligibility Suspended. SM transferred from the SELRES to the ING or IRR for reasons other than to fulfill a religious missionary obligation, for a maximum of 12 months.

ESED = Date of transfer orders into ING or IRR.

b. CC – Eligibility Suspended. SM transferred from the SELRES to the ING or IRR to fulfill a religious missionary obligation, for a maximum of 36 months.

ESED = Date of transfer orders into ING or IRR.

c. CD – Eligibility Suspended. SM awaiting final determination of unsatisfactory participation (absent from drills or Annual Training only).

ESED = Date of ninth unexcused absence within a 12-month period or first day of missed Annual Training.

d. CE – Eligibility Suspended. SM accepts a MILTECH position. This is not considered a break in service.

ESED = date departed contracted position.

e. CF – Eligibility Suspended. SM entered AGR program. This is not considered a break in service.

ESED = Date SM entered AGR program.

f. CG – Eligibility Suspended. SM is in receipt of a ROTC Scholarship under Title 10 USC, Section 2107. These are often referred to as Dedicated Guard or Minuteman ROTC Scholarships.

ESED = Date SM signed a Title 10 USC, Section 2107 scholarship contract. MGIB-SR entitlement suspended under this rule will not be reinstated if the ROTC Scholarship is completed on/after 15 Jan 2015 IAW DoDI 1322.17. Note: Receipt of a ROTC Scholarship under Title 10 USC, Section 2107a has no impact on MGIB-SR Kicker entitlement.

5. **Reinstatement from Suspension.** When certain conditions are met, the State GI Bill Manager must submit Kicker ACR in GIMS to change the following Kicker ESC to the appropriate eligible code (“B” code):

a. CB. When the SM returns to the SR within 12 months from a first authorized break in service, the ESC changes to BB.

ESED = Date SM returns from period of authorized non-availability (ING or IRR). If the break in service occurred during the six-year contractual obligation, the SM must extend within one year of return for a period equal to or greater than the time not served in the SELRES in a drilling status during the contractual obligation, or MGIB-SR entitlement will be terminated per paragraph 6e of this appendix.

b. CC. When the SM returns to the SR within 36 months from a first authorized break in service to complete a religious missionary obligation, the ESC changes to BB. ESED = Date SM returns from period of authorized non-availability (ING or IRR). If the break in service occurred during the six-year contractual obligation, the SM must extend within one year of return for a period equal to or greater than the time not served in the SELRES in a drilling status during the contractual obligation, or MGIB-SR entitlement will be terminated per paragraph 6e of this appendix.

c. CD. When the SM is determined to be a satisfactory participant through the appeal process or after a command decision, the ESC reverts to the code in effect prior to suspension (BA or BB).
ESED = the ESED in effect prior to suspension. If the CD suspension occurred during the MGIB-SR six-year contractual obligation, no extension is required.

d. CE. When the SM leaves the MILTECH status, the ESC reverts to the ESC in effect prior to suspension (BA or BB).
ESED = the ESED in effect prior to suspension. If the MILTECH status occurred during the six-year contractual obligation, no extension is required.

e. CF. When the SM returns to a drilling status from AGR, the ESC reverts to the ESC in effect prior to suspension (BA or BB).
ESED = the ESED in effect prior to suspension. If the AGR duty occurred during the six-year contractual obligation, the SM must extend within one year of return for a period equal to or greater than the time not served in the SELRES in a drilling status during the contractual obligation, and return to the same critical skill unless otherwise authorized by the Director of the ARNG... Failure to extend or remain in the same critical skill will result in the MGIB-SR Kicker termination per paragraph 6.e. of this appendix.

f. CG. When a SM completes a ROTC Scholarship under Title 10 USC, Section 2107 PRIOR to 15 January 2015, the ESC reverts to the ESC in effect prior to suspension (BA or BB).
ESED = The ESED in effect prior to suspension.

6. **Termination.** The State GI Bill Manager must submit a MGIB-SR Kicker ACR in GIMS to change the following Kicker ESC to the appropriate termination code ("D" code) for any of the following reasons:

- a. DA – Not used.
- b. DB – Eligibility Terminated. After completion of the six-year contractual service

obligation, SM is discharged (Civilian Break); failed to re-affiliate from the ING or IRR to the SELRES within the required time limit (12/36 months); or has a second break in service for any reason.

ESED = Date of separation

c. DC – Eligibility Terminated. SM is deceased.
ESED = Date of death.

d. DD – Eligibility Terminated. SM is determined to be an unsatisfactory participant.
ESED = Date of ninth unexcused absence or first missed day of Annual Training.

e. DE – Eligibility Terminated. SM either voluntarily changes MOS or is discharged (civilian break) before completing the six-year obligation, or fails to extend after returning to the SELRES per paragraph 5.a., 5.b. or 5.d. of this enclosure.
ESED = Effective date of MOS transfer, discharge order, or transfer to ING or IRR.

APPENDIX 2 TO ENCLOSURE 5:
MANUAL PROCESSING PROCEDURES MGIB-SR KICKER

1. In the event GIMS is not functional, manual processing procedures may be authorized by the Chief, Education Services Branch. Manual processes are located in the [GI Bill Programs channel](#) in the ARNG Staff-Education Services team on MS Teams. For detailed information on manual processing procedures refer to the GI Bill Manager's handbook.

2. To issue a Manual Kicker Contract (for all Kicker types except NPS/PS) use the 'Manual Kicker Request' tab.
 - a. All applicable fields must be filled in with accurate, researched information.

 - b. Upload the DA Form 4836, DA Form 5447, or additional documents as needed.

 - d. Place comments to be added to GIMS in the request.

 - e. ESC works case and uploads the pre-filled Kicker Addendum in MS Teams.

 - f. State secures addendum, obtains required signatures, and uploads the signed kicker addendum in MS Teams. The addendum must be signed and uploaded within 60 days of issue. Contracts not completed within 60 days will be invalidated.

 - h. ESC reviews submission, approves/disapproves kicker, notifies the state via MS Teams, and codes BEAST.

 - i. When GIMS is functioning, the State Education Staff will request a Kicker MCN following procedures outline in the GI Bill Manager's handbook.

 - j. Once Kicker MCN is received, State uploads approved addendum in IPERMS.

ENCLOSURE 6:
MONTGOMERY GI BILL – ACTIVE DUTY

1. **Overview.** The MGIB-AD program is an educational assistance entitlement established on 1 July 1985 available to SMs who served on qualifying active duty. Title 38 USC requires that any SM in the SELRES that meets eligibility requirements be offered the MGIB-AD and provided the opportunity to accept or decline entitlement.

2. **References.**

a. Title 38, United States Code (USC), Section 3001-3035, Chapter 30 - All Volunteer Force Educational Assistance Program.

b. Isakson and Roe Veterans Health Care and Benefits Improvement Act of 2020, Public Law 116-315, 5 January 2021

c. Department of Defense (DoD) Directive 1322.16, Montgomery GI Bill (MGIB) Program, 18 June 2002.

d. Department of Defense (DoD) Instruction 1336.08, Military Human Resource Records Life Cycle Management, 13 November 2009.

e. Army Regulation (AR) 621-202, Army Educational Incentives and Entitlements, 26 September 2017.

f. Department of Defense Manual (DoDM) 7730.54, Volume 1, Reserve Components Common Personnel Data System (RCCPDS): Reporting Procedures, Enclosure 8, RC Active Service Transaction File, 25 May, 2011.

g. Department of Defense Manual (DoDM) 7730.54-M Volume 2, Reserve Components Common Personnel Data System (RCCPDS): Domain Values for Reserve Component (RC) Personnel Reports, 25 May 2011.

h. Montgomery GI Bill-Active Duty (MGIB-AD) Program – Chapter 30 (NGB-ARM Policy # 07-11), 31 May 2007, hereby superseded.

3. **Funding Authority.** The authority to execute MGIB-AD education entitlement is subject to authorization in law, appropriation of funds, and applicable regulatory guidance.

4. **Eligibility Criteria.** A member of the ARNG who meets the basic eligibility requirements listed in this paragraph, may be enrolled in MGIB-AD. A member establishes eligibility for the MGIB-AD basic benefit when they:

a. Enter:

(1) Active Duty (AD) for the first time on/after 1 July 1985.

(2) Title 10 USC AGR on/after 1 July 1985.

(3) Title 32 USC AGR on/after 29 November 1989.

(4) Title 32 USC AGR who performed active duty between 30 June 1985 and 29 November 1989 and elected to receive coverage under Title 38 USC Chapter 30 within 9 months of 9 October 1996.

b. Complete a qualifying term of service.

c. Have served:

(1) 3 or more years of continuous AD if the obligated period of servicewas 3 or more years, or

(2) 2 or more years of continuous AD if the obligated period of servicewas less than 3 years, or

(3) 20 months of a 24-month contingency order, and released at the convenience of the government, or

(4) 2 years continuous AD plus 4 years in the SELRES.

(5) Mobilized in support of a contingency operation for 2 or more continuous years.

d. Possess a high school diploma or an equivalency certificate or complete the equivalent of 12 semester hours in an education program leading to a standard college degree before applying for benefits.

e. Contribute \$1,200 to the Department of Treasury or have pay reduced by \$1,200 (\$100 per month for the first 12 months of service).

f. Either continue on AD or separate from AD with a fully honorable discharge after completing the qualifying service.

5. Ineligibility Criteria. ARNG SM are not eligible for the MGIB-AD if they meet any of the following criteria:

a. SM is a Service Academy graduate. (Army, Navy, Air Force, Marine Corps, or Coast Guard academies).

b. SM is a Reserve Officer Training Corps (ROTC) Scholarship Recipient under 10 USC 2107 who received:

(1) More than \$2,000 during any one-year period on/after 30 September 1996.

(2) More than \$3,400 during any one-year period on/after 27 December 2001.

c. SM previously declined MGIB-AD while serving an active duty period.

6. **Plus-Up program.** SMs 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 SM 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 non-refundable even if MGIB-AD eligibility is relinquished for Post-9/11 GI Bill eligibility.

7. **Period of Entitlement.** Eligibility period ends 10 years from the last date of honorable discharge/separation from Active Duty. SM must provide a copy of the DD Form 214 (Certificate of Release or Discharge from Active Duty) and VA Form 21-4138 (Statement In Support Of Claim) to the DVA to establish a new delimiting period.

8. **Sunset Period.** New eligibility for MGIB-AD will end 30 September, 2030. SM eligible for MGIB-AD prior to the sunset date will retain eligibility.

9. **Duplication of Educational Assistance.** SM may combine the MGIB-AD Benefits with other federal benefits subject to the following limitations.

a. Traditional drilling SM eligible for MGIB-AD may receive ARNG Federal Tuition Assistance (FTA) simultaneously. This may exceed 100 percent of tuition costs.

b. SM receiving ROTC scholarship funding through the Guaranteed Reserve Forces Duty (GRFD) Scholarship (Title 10 USC, Section 2107a) may be eligible to receive MGIB-AD, or MGIB-Selective Reserve (SR).

c. Top-Up. AGR or mobilized SM currently serving on active duty, who are eligible for the MGIB-AD, may receive monthly MGIB-AD benefits up to the cost of the course only. This means that you may use MGIB-AD to assist in payment of tuition when the cost exceeds the FTA per credit hour cap. However, once they are off active duty the SM can then receive up to the full monthly amount.

d. For a SM who qualifies for two or more GI Bill programs, the maximum allowable entitlement for DVA-administered educational benefits is 36 months from any one program, and a total of 48 months from all programs.

10. Enrollment Responsibilities.

a. Soldier Responsibilities.

(1) Within the first 30 days of entering AGR duty, the SM must make an election to accept or decline and will complete the DD Form 2366 accordingly. Effective 5 Jan 2023, the SM must make an election after completing 180 days of AGR duty, but prior to completing 270 days of AGR duty.

(2) SMs who accept MGIB-AD benefits may choose to enroll in the Plus-Up program. SMs who enroll in the Plus-Up program will complete a DD Form 2366-1.

(3) SMs who accept MGIB-AD benefits must contribute \$1,200 to the Department of Treasury in a lump sum payment or sign a DD Form 2558 (Payroll Deduction Form) to deduct \$100 per month for the first 12 months of service.

b. State Education Office Responsibilities.

(1) The ESO will counsel each new AGR on their MGIB-AD and Post-9/11 GI Bill benefits/eligibility within the first 30 days of entering AGR duty. (After 5 Jan 2023, the ESO will counsel each new AGR between 180 and 270 days of first entering AGR duty)

(2) The ESO will submit the DD Form 2366 (and DD Form 2366-1 if applicable) via the [GI Bill Programs channel](#) in the ARNG Staff-Education Services team on MS Teams for processing. Refer to the GI Bill Manager's Handbook for the latest processing guidance.

(3) The ARNG ESC will verify eligibility of all submissions, code SM eligibility status in applicable DMDC database, and return forms to the State ESO via MS Teams for upload to the SM's OMPF.

(4) The ESO will notify SMs of their eligibility status, and assist the SM with making the appropriate contribution.

(5) The USPFO will process the Soldier's contribution in para 9(a).

ENCLOSURE 7:
POST-9/11 GI BILL GUIDANCE

1. **Overview.** The Post-9/11 GI Bill is an educational assistance program enacted by Congress in recognition of all SMs in every component of the Armed Forces who have sacrificed in answering the call to duty. SMs who served on certain active duty orders on or after September 11, 2001 for 90 aggregate days or more may be eligible to receive the Post-9/11 GI Bill. Title 38 USC Sec 3301 defines "Active duty" for the Post-9/11 GI Bill. The DVA is the final authority on determining eligibility for the basic benefit; they administer all payments to the SM while the individual service components determine eligibility to transfer the benefit to dependents. A SMs previous use of other GI Bill programs may affect eligibility and the amount of total benefits available.

2. **References.**

a. Title 38 United States Code (USC), Section 3301-3327, Chapter 33 – Post-9/11 Educational Assistance.

b. Department of Defense Instruction (DoDI) 1341.13, Post-9/11 GI Bill, 12 July 2018.

c. Army Regulation (AR) 621-202, Army Educational Incentives and Entitlements, 26 September 2017.

d. GI Bill Manager's Handbook. Updated each FY.

3. **Eligibility.** Eligibility and administration of the Post-9/11 GI Bill are the responsibility of the VA. Policies and procedures for utilization of Post-9/11 GI Bill benefits are available from the VA at: <http://benefits.va.gov/gibill/>.

4. **Eligibility Criteria.**

a. SMs must serve on qualifying active duty on or after 11 September 2001, for an aggregate period of 90 days or more. Qualifying active duty includes:

(1) Service in any active component.

(2) Service in the SELRES under Section 688, 12301(a), 12301(d), 12301(g), 12301(h), 12302, 12304, 12304a, or 12304b of Title 10.

(3) Service as an AGR under Title 32.

(4) Service under Section 502(f) of Title 32 when authorized by the President or Secretary of Defense for the purpose of responding to a national emergency declared by the President and supported by federal funds. As of the publication date of this policy, this service includes:

- (a) Operation Noble Eagle, from Sep 11, 2001 through May 31, 2002.
- (b) Southwest Border Support (SWB), from February 15, 2019 through January 20, 2021.
- (c) COVID-19 Response, from March 20, 2020 through July 1, 2022.
- (d) In Support of the Capitol Police (59th Presidential Inauguration) from January 11, 2021 through May 23, 2021.
- (5) At least 30 continuous days of qualifying service with a discharge from a qualifying period of service due to a service-connected disability.
- (6) Awarded a Purple Heart for action on or after 11 September 2001.

b. Receive an honorable discharge following a period of qualifying service.

5. **Eligibility exclusions.** The following periods of service are not qualifying service to establish eligibility for Post-9/11 GI Bill benefit:

- a. Active duty service completed on or before September 10, 2001.
- b. The five-year service active duty obligation for commissioning from a service academy. This five-year service obligation is the first five years of service regardless of any other service obligation that the officer may have incurred due to other incentives.
- c. The four-year active duty service obligation for a Title 10, Section 2107, ROTC Scholarship and Health Profession Scholarship Program (HPSP). For purposes of attaining Post-9/11 GI Bill eligibility, this four-year service obligation is any Post-9/11 qualifying service served during the first four years after commissioning, regardless of any other service obligation that the officer may have incurred
- d. The service obligation associated with the Active Duty Loan Repayment Program (LRP) incentive. For purposes of Post-9/11 GI Bill qualifying active duty service, the service obligation associated with an Active Duty LRP is the first three years of active duty service regardless of the length of the initial service obligation.
- e. Service while a cadet or midshipmen in one of the service academies.
- f. Active duty for Initial Entry Training (IET) if the SM's aggregate qualifying service is less than 24 months.
- g. Service that was terminated because the SM was a minor, was erroneously enlisted, or received a defective enlistment agreement.
- h. AGR service used to establish eligibility for MGIB-AD.
- i. Annual training.

- j. Service in the IRR or ING.
- k. Service while attending Uniformed Services University for the Health Sciences (USUHS).
- l. Title 32 FTNGD-OS / ADOS / ADSW / or ADT not identified in paragraph 4.

6. Responsibilities.

- a. Service member. Each SM requesting use of Post-9/11 will:
 - (1) Seek counseling from the State Education Office and confirm they are eligible for the Post-9/11 GI Bill;
 - (2) Ensure the school and/or courses are authorized for Post-9/11 GI Bill payment and register for program of study;
 - (3) Apply for the Post-9/11 GI Bill with the DVA;
 - (4) Coordinate with school certifying official to ensure they certify hours taken ;
 - (5) Once certified and approved, certify attendance monthly with the DVA either through text message, or the Web Automated Verification of Enrollment (WAVE) website at <https://www.gibill.va.gov/wave/vba> ;
- b. State ESO or delegate will:
 - (1) Provide individual education counseling upon SM request;
 - (2) Ensure SM and units are briefed annually on Post-9/11 and TEB eligibility criteria, and SM responsibilities; and,
 - (3) Act as a liaison, as necessary, between all parties to assist the SM through the Post-9/11 GI Bill application process.
- c. The ARNG ESC will:
 - (1) Upon request, verify SM Post-9/11 GI Bill eligibility and provide counseling;
 - (2) Upon request, communicate with the requesting SM via military email (mail.mil) concerning missing required eligibility documents; and,
 - (3) Upon request, resolve eligibility discrepancies with the DVA.

7. Use of the Post-9/11 GI Bill.

a. The DVA prorates payments based upon the length of qualifying active duty service, as shown in the Appendix to this enclosure.

b. A SM is eligible for up to 36 months of Post-9/11 GI Bill Benefits. If the SM is eligible for more than one program, they may receive a lifetime maximum of 48 months of benefit from all programs combined.

c. If a SM is eligible for another GI Bill program, they must relinquish that program to convert to the Post-9/11 GI Bill. The DVA determines the method and process for SMs to elect to convert or apply for Post-9/11 GI Bill benefits. SM may make their irrevocable election to convert to the Post-9/11 GI Bill through the VA website at www.gibill.va.gov.

d. An election to convert from MGIB-AD (Chapter 30) or MGIB-SR (Chapter 1606), to the Post-9/11 GI Bill is irrevocable and will be governed by the VA.

e. A SM converting from MGIB-SR will receive up to 36 months of Post-9/11 GI Bill, subject to the 48-month lifetime cap. If the SM has a MGIB-SR Kicker, the Kicker will transfer to the Post-9/11 GI Bill.

f. A SM converting from MGIB-AD will receive the number of unused MGIB-AD months in Post-9/11 GI Bill benefit. The DVA will refund a portion of the MGIB-AD contribution when:

- (1) All 36 months of Post-9/11 GI Bill benefit is exhausted;
- (2) The SM uses the last month of benefit, and;
- (3) The SM is eligible to receive the Monthly Housing Allowance.

g. SM who participated in the Plus-Up provision of MGIB-AD will not receive the Plus-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 Plus-Up contribution.

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

i. Time limitation for use and eligibility for entitlement is determined by last discharge / release from AD beginning on the date of such discharge or release:

(1) If the last day of qualifying service is before 1 January 2013, eligibility expires 15 years from the last day of qualifying service.

(2) If the last day of qualifying service is on or after 1 January 2013, eligibility never expires.

(3) Expired Post-9/11 GI Bill eligibility may be reinstated if the SM completes an additional period of qualifying service of 90 continuous days or more. The new expiration date will be calculated from the separation date of the latest period of qualifying service.

APPENDIX TO ENCLOSURE 7:
ELIGIBILITY PERCENTAGE CHART FOR POST-9/11 GI BILL

(Effective 1 August 2020)

Service Requirements on/after 11 September 2001, an individual must serve an aggregate of	Percentage of Maximum Benefit Payable
At least 36 months	100
At least 30 continuous days on active duty and discharged due to service-connected disability	100
Purple Heart Recipient (eff. 1 AUG 2018, retroactive)	100
At least 30 months, but less than 36 months	90
At least 24 months, but less than 30 months	80
At least 18 months, but less than 24 months*	70
At least 6 months, but less than 18 months*	60
At least 90 days, but less than 6 months*	50

* Initial Entry Training served on or after 11 September 2001 may be included only after the service member has completed 24 months of other qualifying active duty.

ENCLOSURE 8:
TRANSFER OF EDUCATION BENEFIT (TEB) PROGRAM

1. **Overview.** Enacted on 1 August 2009, the ARNG TEB is an incentive program for continued service and is intended to promote retention in the ARNG. Unlike the Post-9/11 GI Bill, the TEB program is neither a SM entitlement nor a transition benefit. TEB intends to shape and retain the career force. SMs unable to commit to the required service obligation due to various service-limiting conditions are not eligible to participate in this program. SMs with eligible dependents are encouraged to submit a TEB request as soon as they meet the TEB approval requirements.

2. **References.**

a. Title 10, United States Code (USC), Section 12732, Entitlement to retired pay: computation of years of service.

b. Title 38, United States Code (USC), Section 3301-3327, Chapter 33 - POST-9/11 Educational Assistance.

c. Department of Defense Instruction (DoDI) 1341.13, Post-9/11 GI Bill, 12 July 2018.

d. Army Regulation (AR) 621-202, Army Educational Incentives and Entitlements, 26 September 2017.

e. Army Regulation (AR) 600-8-2, Suspension of Favorable Personnel Actions (Flag), 11 May 2016.

f. Army Regulation (AR) 635-40, Physical Evaluation for Retention, Retirement, or Separation, rapid Action Revision, 20 March 2012.

g. Army Regulation (AR) 635-200, Active Duty Enlisted Administrative Separations, 19 December 2016.

3. **Eligibility.** SMs who meet all of the following requirements may be eligible for TEB approval. The eligible SM must meet all of the requirements prior to TEB approval:

a. Be serving in an active status as a drilling member of the SELRES, AGR, or on active duty;

b. Be entitled to the Post-9/11 GI Bill, and not be past the delimiting date;

c. Have completed at least six years of creditable service in the Armed Forces (active duty or SELRES);

d. Not be serving under a Suspension of Favorable Personnel Actions (SFPA) Flag, including flags for failure to maintain physical fitness or height and weight standards;

e. Commit to serve at least four continuous years in the ARNG in accordance with paragraph 9 of this policy. The SM must have an Expiration Term of Service (ETS) date, Retention Control Point (RCP), or Mandatory Release Date (MRD) equal to or greater than four years from the TEB request date.

f. For the purposes of meeting the requirement in paragraph c. and e- A creditable year is any year in which a SM:

(1) Completes one year of service in any active component, or

(2) Earns 50 or more points toward retirement eligibility in an active status in the Reserve Component.

g. Creditable years of service are verified using:

(1) DD Form 214, NGB Form 23, or NGB Form 220.

(2) Contractual documents within iPERMS verified with supporting database evidence within IPPS-A, BEAST, or GIMS.

h. Effective 31 August 2018, a SM who has been awarded a Purple Heart is only required to meet the requirements in paragraph a. and b. They are not required to meet time in service, flagging, or service obligation requirements.

i. The SM must meet all eligibility requirements on their TEB request date, and supporting documents must be available in the SM's iPERMS file or within the documents tab in GIMS at the time the request is reviewed, or the request will be rejected. The SM may reapply when all eligibility requirements are met and documents are provided. The four-year service obligation will be calculated from the newest request date.

j. If a request is denied but the SM provides evidence that they did meet the eligibility requirements on the original request date, the denied request will be approved and the service obligation will be calculated from the original request date.

k. A SM who was considered under a Qualitative Retention Board (QRB), Release from Active Duty (REFRAD), or Integrated Disability Evaluation System (IDES) boards who has been selected for retention and is able to commit to the required service obligation may apply for TEB.

4. Eligibility Exclusions. Soldiers are not eligible for TEB approval unless they meet all of the requirements in paragraph 3. This includes but is not limited to:

- a. A SM who is not eligible for the Chapter 33 Post-9/11 GI Bill, including a SM whose eligibility has expired IAW Enclosure 3, paragraph 7j of this policy;
- b. A SM who separated from active duty or active service in the SELRES prior to 1 August 2009;
- c. A separated SM who failed to request TEB while serving on active duty or while in an active status in the SELRES;
- d. A SM who is unable to commit to the required TEB service obligation due to Retention Control Point (RCP), Mandatory Retirement Date (MRD), maximum age, or State or ARNG policy;
- e. A SM who submits a TEB request on or after the convening date for a force-shaping board such as the QRB or REFRAD Board. A SM considered under these boards who is selected for retention and is able to commit to the required service obligation may apply for TEB;
- f. A SM who submits a TEB request on or after being enrolled in the Integrated Disability Evaluation System (IDES), which includes Medical Evaluation Board (MEB) and Physical Evaluation Board (PEB). A SM who completes the evaluation and is found fit for duty may apply after committing to the required service obligation;
- g. A SM who submits a TEB request while serving under Sanctuary orders; or
- h. A SM who has an active SFPA Flag indicator in GIMS, including failure to maintain fitness or height and weight standards (codes J or K). A SM who is flagged on the TEB request date will have his or her TEB request denied. The SM may reapply after the flag is cleared.

5. **Eligible Dependents.** Eligible dependents must be enrolled in the Defense Enrollment Eligibility Reporting System (DEERS). Each SM is responsible for ensuring his or her dependents are appropriately identified in DEERS and on the TEB website as eligible.

- a. A SM approved to transfer unused Post-9/11 GI Bill benefits may transfer to -
 - (1) A spouse;
 - (2) One or more children under age 21, or under age 23 if the dependent is full-time student
 - (3) A ward or foster child placed in the legal custody of the SM for at least 12 months prior to requesting TEB as a result of a court order; or
 - (4) A combination of the above.

- b. An eligible SM may transfer education benefits at any time.
- c. A SM serving in an active status who previously transferred benefits may add additional dependents without incurring an additional service obligation.
- d. A SM who previously transferred education benefits may modify the number of months transferred to his or her dependents at any time, regardless of whether the SM is currently serving actively or has discharged from the ARNG. They may increase, decrease, or revoke the months transferred.
- e. A SM may transfer up to 36 months of education benefits, or the number of any unused Post-9/11 GI Bill benefit months remaining as determined by the DVA, whichever is less.
- f. After separating from military service, a SM cannot transfer benefits to additional dependents who have not previously received transferred benefits.

6. Responsibilities.

- a. Service member. Each SM requesting TEB will:
 - (1) Contact the DVA and confirm the number of GI Bill months that are available to be transferred https://www.benefits.va.gov/gibill/contact_us.asp;
 - (2) Seek counseling from the State Education Office regarding any questions before submitting a TEB request;
 - (3) Confirm they are eligible for the Post-9/11 GI Bill;
 - (4) Verify the documents necessary to validate Post-9/11 GI Bill and TEB eligibility are available in iPERMS;
 - (5) Ensure they will have at least four years of ARNG service remaining on the TEB request date;
 - (6) Coordinate with his or her designated ARNG representative to remove any flags that prevent TEB approval;
 - (7) Ensure eligible family members are entered in DEERS;
 - (8) Submit a TEB request on the DoD TEB section in milConnect at <https://www.dmdc.osd.mil/milconnect>, and acknowledge and agree to the required service obligation by checking each box and clicking the submit button;
 - (9) Review his or her military email (army.mil) account for correspondence and respond in a timely manner;

(10) Log into the TEB website to check on the status of his or her TEB request and to verify the TEB Obligation End Date (OED);

(11) Review the TEB approval form on the TEB website for accuracy and retain a copy for his or her personal records; and

(12) Serve until the OED listed in milConnect and on the TEB approval form.

b. Unit Commanders. Unit Commanders or their delegates will -

(1) Assist the SM by completing a reenlistment/extension, if necessary;

(2) Ensure the SM Post-9/11 GI Bill and TEB eligibility documents are properly uploaded to iPERMS;

(3) Review each SM TEB OED in GIMS prior to forwarding a request for separation or retirement orders or orders transferring to the IRR or ING;

(4) Coordinate with the State Education Office for individual separation counseling for the SM if the TEB OED will not be completed; and

(5) Ensure separation counseling documentation (Appendix 4) is uploaded into the SM record in GIMS.

c. State Education Services Officer. The State Education Services Officer (ESO) or delegate will:

(1) Monitor the appropriate work bins in GIMS and assist the SM with providing necessary documentation for TEB approval;

(2) Provide individual education counseling upon SM request for a SM considering TEB;

(3) Ensure SM and Units are briefed annually on TEB eligibility criteria, the required service obligation, consequences for failure to complete the service obligation, SM responsibilities, and dependent use;

(4) Counsel each separating SM who will not complete his or her OED;

(5) Upload separation counseling documentation (Appendix 4) into the SM record in GIMS; and,

(6) Act as a liaison, as necessary, between all parties to assist the SM through the TEB approval process.

d. The ARNG Education Support Center. The ARNG Education Support Center (ESC) will:

(1) Verify the SM TEB eligibility requirements using documents and data in iPERMS, GIMS, and/or BEAST and ensure compliance with ARNG TEB requirements;

(2) Communicate with the requesting SM and State Education Services Officer via military email (army.mil) concerning necessary approval steps and/or missing required documents;

(3) Record the TEB request approval or denial in GIMS and the TEB website;

(4) Record the SM TEB OED in GIMS and the TEB website; and

(5) Modify SM established TEB OED to the date of separation upon notification of SM separation from the ARNG for reasons identified in paragraph 11 of this policy.

7. Procedures to Transfer.

a. The SM must use the milConnect website to request TEB. Only dependents enrolled in DEERS and listed as eligible in the TEB website at the time of the transfer's request are eligible to receive TEB benefits;

b. By electing to transfer benefits, the SM agrees to serve the TEB service obligation as outlined in paragraph 9.

c. Rejection of a TEB request will occur if a SM does not have four years of service remaining on his or her contract. The SM must extend in order to meet the service obligation before applying for TEB. The SMs ETS date, RCP, or MRD **must** be four or more years from the TEB request date.

d. After approval, the SM must use the TEB website to modify or revoke transferred benefits.

(1) A SM who modifies benefits or adds new dependents does not incur an additional service obligation. A SM may only add new dependents while serving in an active status.

(2) Revoking benefits will not automatically remove the associated service obligation. After revoking benefits from all dependents, a SM may request removal of the service obligation. The ARNG considers removing service obligations on a case-by-case basis. Once a dependent uses transferred benefits, the SM is required to serve until his or her OED. Unless the SM meets one of the authorized exceptions in paragraph 11, failure to complete the service obligation will result in recoupment of all previously paid benefits by the DVA.

8. **TEB Approval.**

a. The ESC will verify that the SM requesting TEB meets all of the eligibility requirements prior to approving a TEB request. The ESC will immediately reject requests that do not meet all of the eligibility requirements.

b. The ESC will update GIMS and the TEB website to record the SM OED. The ESC is not responsible for ensuring a SM dependent information is correct.

c. The SM transferring benefits is responsible for returning to the TEB website to verify the approval status of the TEB request. The SM must notify the State ESO immediately if they do not intend to complete the entire service agreement.

d. Upon approval of the TEB request, the SM should retain a copy of the TEB approval form from the TEB website for his or her personal records.

e. After the determination of the TEB request, the ESC will send an email to the SM at the military email address listed in the global address book.

f. It is the State ESOs responsibility to answer questions regarding TEB approval or disapproval.

9. **Service Obligation.** All SMs requesting TEB must commit to a four-year service obligation beginning on the TEB request date, regardless of their previous years of service.

a. The TEB service obligation begins on the date of the SM TEB request, and runs concurrently with any other additional service agreements in effect at the time of the transfer. The TEB benefit will not limit any other reenlistment option or incentive to which a SM may be eligible.

b. The service member may serve the four-year obligatory period on active duty in the regular component ,in an active status as a member of the SELRES, or in the IRR on active duty.

c. During the four-year obligatory period, SMs are not authorized a break in service. Any break in service during the SM service obligation, including transfer to the IRR or ING, is a failure to complete the service obligation.

d. The SM may transfer to another component during the TEB service obligation. The transfer must occur without a break in service.

(1) If the SM received an approved TEB request while serving in the ARNG and the SM transfers to another component prior to completing the service obligation, it is the SM responsibility to provide documentation to the ESC demonstrating acceptance in another component. The SM must also demonstrate the ability to complete the balance of the TEB service obligation in that component.

(2) If the SM received an approved TEB request while serving in another component and the SM transfers to the ARNG prior to completing the service obligation, it is the SM responsibility to provide documentation to the ESC demonstrating that they remain eligible for TEB and are able to complete the balance of the service obligation in the ARNG.

e. Completing the requirements for regular or non-regular retirement (20-Year Letter) does not absolve the SM from completing the TEB service obligation.

10. Failure to complete the service obligation. SM who separate from the ARNG prior to completing their TEB service obligation are not eligible to retain a previously approved TEB. Violating the TEB service obligation triggers TEB termination, and if any dependent has received payment, the SM and dependents may incur an overpayment debt from the DVA for the full amount of benefits paid.

a. Failure to complete the service obligation includes, but is not limited to -

(1) A SM who transfers to the IRR or ING prior to completing the service obligation;

(2) A SM who is released from the ARNG for performance, conduct, and/or potential for advancement reasons including, but not limited to separation under the provisions of the Qualitative Management Program (QMP);

(3) A SM who receives an involuntary (punitive) reduction in rank and cannot complete the service obligation due to a change in their RCP or MRD;

(4) A SM who receives a 20-Year Letter and retires prior to their OED;

(5) A SM who retires or separates in lieu of consideration by a separation board;

(6) A SM who fails to complete the required TEB service obligation for any reason not specifically authorized in paragraph 11;

(7) A SM who is involuntarily separated for refusal to receive the COVID-19 vaccination.

b. A SM whose TEB has been rejected for failure to complete the service obligation is not precluded from entering another TEB request if they return to active status and are otherwise eligible. However, a subsequent TEB approval does not alleviate any debt that incurred from the previous rejected transfer. The most recent approved TEB request determines the SMs OED.

11. Authorized Exceptions. A SM who fails to complete the TEB service obligation and is separated from the ARNG due to one of the following situations may retain TEB, provided the TEB request was approved and an OED established prior to separation.

- a. Death of the SM. The death of a SM who transferred benefits will not affect the use of the entitlement by the dependent to whom the entitlement was transferred;
- b. Discharge or release from the ARNG for a pre-existing medical condition which was not service-connected;
- c. Discharge or release from the ARNG for hardship;
- d. Discharge or release from the ARNG for a disability, or a physical or mental condition that was not characterized as a disability and did not result from the individual's own willful misconduct but did interfere with the individual's performance of duty;
- e. Entry into Sanctuary and completion of the full Sanctuary period;
- f. Transfer to the IRR in an active duty or mobilized status; or,
- g. Involuntary discharge or release through a service force-shaping or reduction in force initiative. The SM must request TEB and be eligible for approval prior to the convening date of any separation board. The SM must not retire in lieu of consideration by a separation board. Examples of force-shaping or reduction in force initiatives include but are not limited to:

- (1) QRB;
- (2) Temporary Early Retirement Authority (TERA);
- (3) Selective Early Retirement Board (SERB) and Enhanced Selective Early Retirement Boards (E-SERB);
- (4) AGR REFRAD Board;
- (5) Active Service Management Board (ASMB); or
- (6) Two-time non-selection for promotion.

12. Dependent Use of Transferred Benefits. After a SM TEB request is approved and Post-9/11 GI Bill benefits have been transferred, eligible dependents may use the benefit as follows:

- a. Spouse:
 - (1) Upon TEB approval. The SM duty status determines the spouse's benefit payment and is the same as that of the transferring SM.
 - (a) While the transferring SM is serving in a qualifying Title 10/32 active duty status per Enclosure 7, paragraph 4, the spouse is NOT eligible to receive the Monthly Housing Allowance (MHA).

(b) While the transferring SM is serving in a non-qualifying Title 10/32 status or is out of service, the spouse is entitled to the tuition and fees payment, the book and supplies stipend and, if otherwise eligible, MHA.

(2) A Spouse's expiration date for transferred benefits is the same as that of the transferring SM and is based on the transferring SM's last date of separation from qualifying service:

(a) If the SM's separation from qualifying service is prior to 1 January 2013, the benefits expire 15 years from the date of separation. The SM is authorized to extend this period if the SM later completes an additional qualifying period of service of at least 90 consecutive days.

(b) If the SM separation from qualifying service is on or after 1 January 2013, the benefits do not expire.

(3) Divorce will not automatically affect a former Spouse's eligibility to use a transferred benefit. However, the SM retains the right to revoke or modify a transferred benefit at any time. Law does not allow the distribution of TEB benefits to dependents by another party through the Power of Attorney process or in a divorce decree, as these benefits are not marital property.

b. Child/Dependent -

(1) After the transferring SM has completed at least 10 years of service in the Armed Forces or is involuntarily separated prior to completing the OED for reasons in paragraph 11 of this policy;

(2) After the child has completed a secondary school diploma (or equivalency certificate) or has reached 18 years of age, whichever occurs first; and,

(3) Until their 26th birthday or until the transferred benefits are exhausted, whichever occurs first.

(4) A child's subsequent marriage will not affect their eligibility to use a transferred benefit.

(5) A SM active duty status does not affect the child's benefit. A child is entitled to the tuition and fees payment, the books and supplies stipend, and the MHA.

c. Each of the SM's dependents must first apply for their own Certificate of Eligibility (CoE) from the DVA before they can use their transferred benefits. Dependents apply for benefits on the DVA website at <https://www.va.gov>. The DVA will determine eligibility and send the dependent a CoE.

APPENDIX TO ENCLOSURE 8:
Sample Separation Counseling Form – Post-9/11 TEB Program

Rank/Name: _____ SSN: _____

Unit: _____

Counseling Date: _____ ETS / MRD / Separation Date: _____

1. Service Representative Certification.

The SM records have been reviewed to determine eligibility for CH 33 and TEB.

- a. SM is / is not eligible for the Post-9/11 GI Bill. (If not eligible, skip to section 4)
- b. SM is / is not eligible for Transfer of Education Benefits.
- c. SM has / has not requested Transfer of Education Benefits. (If not, complete section 2 and 4 only)

2. SM Certification (Initial all).

a. _____ I understand that if I wish to transfer my Post-9/11 GI Bill benefits to my dependent(s), I must complete the transfer while actively serving and meet all TEB eligibility requirements. I cannot request TEB after I separate from service.

b. _____ I understand that if I have requested or intend to request TEB it is my responsibility to ensure that I complete all required steps, confirm my request is approved, and complete my service obligation prior to my separation from the ARNG.

c. _____ I understand that after I separate from the ARNG I may only modify or revoke benefit months for the dependent(s) I transferred to while I was actively serving. I may not transfer benefits to additional dependents after my separation from the ARNG.

3. If SM has an approved TEB request.

a. Verified Obligation End Date (OED) _____

b. _____ I acknowledge that my TEB OED is _____. I understand that if I voluntarily separate from the ARNG prior to that date, my TEB approval will be rejected and any payments made to my dependents will be treated as a debt by the VA and will be subject to recoupment.

4. Endorsements.

Service Representative:

Soldier:

Printed Name: _____ Printed Name: _____

Signature: _____ Signature: _____

Date: _____ Date: _____

ENCLOSURE 9:
FEDERAL TUITION ASSISTANCE (FTA)

1. **Overview.** The Army provides TA for voluntary off-duty education programs in support of a Soldier's professional and personal self-development goals. The use of TA directly contributes to retaining quality Soldiers, enhancing their career progression, improving Army readiness, and preparing Soldiers for meaningful employment in their transition from military service.

2. **References.**

a. Army Regulation (AR) 621-5, Army Continuing Education System, 28 October 2019.

b. Department of Defense Directive (DODD) 1322.08E, Voluntary Education Programs for Military Personnel, 03 April 2005.

c. Department of Defense Instruction (DODI) 1322.19, Voluntary Education Programs in Overseas Area, 9 May 1988.

d. Department of Defense Instruction (DODI) 1322.25, Voluntary Education Programs, 7 July 2014.

e. DOD Financial Management Regulation: Volume 4, Accounting Policy; Chapter 3, Receivables, February 2016.

f. Army Directive 2018-09 (Army Tuition Assistance Policy), 6 June 2018.

3. **Roles and Responsibility.** The FTA program is administered by NGB assigned Title 5, Department of the Army Civilians (DACs). Below are the roles and responsibilities of the personnel responsible for program administration.

a. Chief, Education Services Branch. The Chief, Education Services Branch (ARNG-HRH-C) is responsible for the overall management and administration of the FTA program for the ARNG including funding and assignment of personnel.

b. FTA Program Manager. The FTA Program Manager (ARNG-HRH-C) reports to the Chief, Education Services Branch and is responsible for ensuring the effective administration of the FTA program. The FTA Manager provides guidance, training, and support to assigned ESSs and SESSs.

c. Supervisory Education Services Specialist (SESS). NGB organizes ARNG states into regions determined by resourcing, end strength, and FTA workload. NGB assigns each region a Title 5, Department of the Army Civilian SESS to provide

supervisory oversight of the ESSs and the FTA program for the states in their assigned region(s). SESSs report to the Chief, Education Services Branch (ARNG-HRH-C) and are responsible for ensuring the effective management and administration of the FTA program in their assigned region(s).

d. Education Services Specialists (ESS). NGB assigns each state and territory a Title 5, Department of the Army Civilian (DAC) ESS to administer the FTA program. Due to limited resources, an ESS may not be physically assigned to every state. Regardless of their physical location, ESSs are responsible for administering the FTA program in their assigned state(s) and providing education counseling and support as directed.

4. Education Center Assignment. The following ARNG Soldiers duty status' determines the education center assigned to:

a. M-Day, Title 32 Active Duty for Operational Support (ADOS), State activated M-Day Soldiers. Assigned to their State Education Center.

b. Title 10 or 32 AGR, Title 10 ADOS, federally deployed M-Day Soldiers. Assigned to the closest Active-Duty Army Education Center.

5. Eligibility Criteria and Benefits. For current policy on FTA eligibility criteria and benefits refer to the latest Army Tuition Assistance (TA) policy. The latest Army TA policy is located on the [ARNG FTA/CA channel on MS Teams](#) or the [ACCESS AU Counselor Team](#).

6. Service Obligation. Below is information pertaining the service obligation incurred by ARNG Soldiers receiving FTA benefits. For additional information on service obligations refer to AR 621-5 and the latest Army Tuition Assistance policy.

a. ARNG commissioned officers serving in an M-day status in the ranks of CW2, 2LT, and above incur a four year RDSO commencing on the ending date of the last class for which TA was received (ARNG officers serving on Title 10/32 AGR and those who are federally mobilized serve a 2--two year ADSO). The duty status of the officer on the class start date will determine whether an ADSO or RDSO is applied.

b. When ArmyIgnitED does not accurately reflect an Officers AD or AGR time, the SM can request a detailed letter of service from the National Guard Bureau Education Services Branch. The letter will state the times and dates the SM served, and in which capacity. NGB will forward the letter to ACCESS AU Finance Branch to reduce, eliminate, or mandate an education debt.

c. Mobilized SELRES officers not retained on active duty may serve an ADSO or RDSO period of service in an active drilling status within a component of the selective reserve.

7. Duplication of Educational Assistance. Below is a summary of benefits considered a duplication when used with FTA. For additional information on duplication of benefits, refer to the latest Army Tuition Assistance policy or AR 621-5.

a. MGIB-SR. ARNG Soldiers may receive FTA and MGIB-SR (Ch 1606) benefits at the same time for the same course when attending half-time or more.

b. MGIB-AD. ARNG Soldiers serving in an M-day status with previously earned MGIB-AD (Chapter 30) benefits, may receive FTA at the same time and the combination of those benefits may be in excess of the cost of tuition and fees. ARNG Soldiers serving on Title 10/32 AGR may receive MGIB-AD benefits in conjunction with FTA subject to the MGIB-AD Top-Up restriction.

c. State-funded TA. ARNG Soldiers using State TA and FTA benefits together may not receive benefits beyond the cost of tuition and fees.

ENCLOSURE 10:
CREDENTIALING ASSISTANCE (CA)

1. **Overview.** Eligible SMs may use CA to pursue self-initiated, self-directed credentials. Army COOL maintains a list of eligible credentials. The CA program directly contributes to improving total Army readiness, supporting SM professional development, retaining quality SMs, and preparing SMs for meaningful employment upon transition from military service. The CA program reinforces the professionalization and readiness of the total force.

2. **References.**

a. Army Regulation (AR) 621-5, Army Continuing Education System, 28 October 2019.

b. Department of Defense Directive (DODD) 1322.08E, Voluntary Education Programs for Military Personnel, 03 April 2005.

c. Department of Defense Instruction (DODI) 1322.19, Voluntary Education Programs in Overseas Area, 9 May 1988.

d. Department of Defense Instruction (DODI) 1322.25, Voluntary Education Programs, 15 March 2011.

e. DOD Financial Management Regulation: Volume 4, Accounting Policy; Chapter 3, Receivables, February 2016.

f. Army Directive 2018-08 (The Army Credentialing Assistance Program), 6 June 2018.

3. **Roles and Responsibility.** The CA program is administered by federal, Title 5, Department of the Army Civilians (DACs) assigned by NGB. Below are the roles and responsibilities of the personnel responsible for program administration.

a. Chief, Education Services Branch. The Chief, Education Services Branch (ARNG-HRH-C) is responsible for the overall management and administration of the CA program for the ARNG including funding and assignment of personnel.

b. CA Program Manager. The CA Program Manager (ARNG-HRH-C) reports to the Chief, Education Services Branch and is responsible for ensuring the effective administration of the CA program. The CA Manager provides guidance, training, and support to assigned ESSs and SESSs.

c. Supervisory Education Services Specialist (SESS). NGB organizes ARNG states into regions determined by resourcing, end strength and FTA workload. NGB assigns each state and territory a Title 5, Department of the Army Civilian SESS to provide

supervisory oversight of the ESSs and the CA program for the states in their assigned region(s). SESSs report to the Chief, Education Services Branch (ARNG- HRH-C) and are responsible for ensuring the effective management and administration of the CA program in their assigned region(s).

d. Education Services Specialists (ESS). NGB assigns each state and territory a Title 5, Department of the Army Civilian ESS to administer the CA program in his or her assigned state(s). Due to limited resources, your State ESS may support you from an alternate location/State. Regardless of their physical location, ESSs are responsible for administering the CA program in their assigned state(s) and providing education counseling and support as directed.

4. **Education Center Assignment.** The following duty status types determine the education center ARNG Soldiers are assigned to:

a. M-Day, Title 32 ADOS, State activated M-Day Soldiers. Assigned to their State Education Center.

b. Title 10 or 32 AGR, Title 10 ADOS, federally deployed M-Day Soldiers. Assigned to the closest Active-Duty Army Education Center.

5. **Eligibility Criteria and Benefits.** For current policy on CA eligibility criteria and benefits refer to the latest Army CA policy located on the [ARNG FTA/CA channel on MS Teams](#) or the [ACCESS AU CA Team](#).

6. **Service Obligation.** There is no required service obligation for officers to use Credentialing Assistance.

7. **Concurrent use of Veteran's Educational Benefits.** Below is a summary of the benefits considering a duplication when used with CA. For additional information on duplication of benefits, refer to the latest Army CA policy or AR 621-5.

a. MGIB Benefits. ARNG Soldiers may not receive CA and GI Bill benefits to cover the same costs. ARNG Soldiers may use GI Bill benefits to pay exam related fees/costs not paid by CA.

b. State-funded TA. Soldiers using State TA and CA benefits together may not receive benefits beyond the cost of the course, supplies, and fees.

ENCLOSURE 11:
ARMY PERSONNEL TESTING (APT) PROGRAM

1. **Overview.** The APT Program provides Soldiers with the opportunity to take standardized tests to determine eligibility for specialized training and to support the Army's personnel selection and classification process including language proficiency testing. This policy provides ARNG specific guidance and procedures in the administration of the APT program.

2. **References.**

- a. Army Regulation (AR) 611-5, Personnel and Classification Testing, 25 April 2022.
- b. Army Regulation (AR) 11-6, Army Foreign Language Program, 25 February 2022.
- c. Army Personnel Testing Test Control Officer Handbook, July 2019.
- d. ARNG Army Personnel Testing Test Handbook, February 2022.

3. **Administration.** State Education Office Staff submit all annual requirements, TCO/ATCO/TE appointments, and requests for Exception to Policy (ETP) through the respective channel under the [ARNG Army Personnel Testing \(APT\) Team](#) on MS Teams.

a. **Test Site Establishment.** States wanting to establish a new test site or subtest site will submit the Test Site Establishment Memorandum located in the Information tab at the top of the Test Site Establishment channel. Upon test site approval and test site ID issuance, the site will submit a TCO/ATCO/TE appointment.

b. **TCO/ATCO/TE Appointment.** Test sites wishing to update testing personnel will use the current TCO/ATCO/TE Appointment memorandum located on the Information tab at the top of the Channel. The appointment memorandum will list all testing personnel assigned, accompanied with a matching APT Test Account Validation form, and training certificates outlined in the current APT Handbook. It is imperative for all personnel appointment rescissions upon departure. Failure to rescind appointments allows for unauthorized access to APT exams and prevents appointed personnel from taking an APT exam for one year after appointment rescission.

c. **Annual APT Requirements.** Annual APT requirements are due February of each year unless directed otherwise. Each test site must submit; Test Account Validation, Facility Annual Review, and their local Standard Operating Procedures using templates located channel under the ARNG Army Personnel Testing (APT) Team on MS Teams. All documents will be dated February of the current year. Any changes to testing personnel (TCO/ATCO/TE) must be included with the annual requirements. States will not be marked as complete until all documents are received. Failure to submit annual requirements within the designated timeline will result in test site closure.

d. Exception to Policy (ETP). The State Education Office, for which the Soldier belongs, is the only entity authorized to submit APT ETPs on behalf of ARNG Soldier. State Education Office staff submits all APT ETPs through the ETP Request Channel. State personnel are to initiate the ETP using the current ETP template memorandum provided in the Information Tab at the top of the channel. The ETP memorandum must include at least one of the following documents demonstrating proof of study;

(1) Certificate of completion of Online Academic Skills Course (OASC) completion (Soldier name must be visible). This is the only online study method authorized for an ETP IAW the APT Handbook.

(2) Basic Skills Education Program (BSEP) training certificate/memorandum signed by training provider indicating 40 hours or more of training.

(3) Course attendance verification signed by the entity providing the Functional Academic Skills Training course instruction is required for those Soldiers requesting to retest immediately following BSEP completion.

4. **Eligibility.** All Army Soldiers (Active Army, USAR and ARNG), as well as other services are eligible for testing in the APT program. The ARNG APT Handbook lists test restrictions for SMs serving in other services. In certain instances, DoD Civilians can also be tested. Examinees must possess a DoD identification card. Members of the IRR and retired SMs are treated as DoD Civilians and must be directed to the nearest UPMEPCOM for testing.

5. **Responsibilities.**

a. Chief, Education Services Branch (ARNG-HRH-C). The Chief, Education Services Branch at NGB is responsible for the overall administration and management of the APT program for the ARNG including developing policy and allocating resources for test sites.

b. Testing Program Manager (ARNG-HRH-C). The Testing Program Manager at NGB provides guidance, processes test site requests, appointments and ETPs, receives annual APT requirements, submits to ACCESS Army University and helps test sites maintain compliance with applicable regulations and policies.

c. ESO. Within 90 days of assignment, ESOs must complete all required training and be appointed as the TCO for the state. The ESO has overall responsibility for ALL ARNG APT test sites in his/her assigned state.

d. NGB Title 5 DACs/ESSs. Within 90 days of assignment, ESSs located in states with an active APT site within the state education office must complete all required training and be appointed as an ATCO in their assigned state. ESSs serve as ATCOs and will assist the TCO in administering APT exams as required.

ENCLOSURE 12:
EDUCATION SUPPORT PROGRAMS

1. **Overview.** There are numerous education support programs available to assist state/territory education office personnel in providing counseling and support to ARNG Soldiers and family members to help them pursue their voluntary education goals and objectives. A detailed summary of each of these programs is provided in the ARNG Education Handbook, on MS Teams. See below for a list of recommended programs.

2. **Administration.** State education staff are encouraged to become familiar with these programs and services in order to offer them as resources and explain them to Soldiers during education counseling.

3. **Tools to assist Soldiers with their educational decisions.**

- a. Joint Services Transcript (JST), <https://jst.doded.mil/>
- b. Career Path DECIDE, <https://careerpathdecide.usalearning.gov/>
- c. College Navigator, <http://nces.ed.gov/collegenavigator/>
- d. College Scorecard, <https://collegescorecard.ed.gov/>
- e. GI Bill Comparison Tool, <https://www.va.gov/gi-bill-comparison-tool>
- f. Kuder Journey, <http://dantes.kuder.com>
- g. Occupational Outlook Handbook (OOH), www.bls.gov/oo
- h. O*NET OnLine, <http://www.onetonline.org/>
- i. TA DECIDE, www.dodmou.com/TADECIDE/
- j. ACE Military Guide, <https://www.acenet.edu/Programs-Services/Pages/Credit-Transcripts/Military-Guide-Online.aspx>

4. **Tools to assist Soldiers while enrolled in school.**

- a. Army e-Learning, <https://www.atrrs.army.mil/selfdevctr/eLearningWelcome.aspx>
- b. MWR Library Online Resources, <https://mwrlibrary.armybiznet.com/selfreg>
- c. Online Academic Skills Course (OASC) and College Placement Skills Training (CPST), <https://dantes.petersons.com/>
- d. Tutor.com, <https://military.tutor.com/home>

- e. Coursera, www.coursera.org
 - f. Federal Academic Alliance, <https://www.opm.gov/wiki/training/Federal-Governmentwide-Academic-Alliances.ashx>
 - g. Khan Academy, www.khanacademy.org
 - h. Massive Open Online Course (MOOC), <https://www.classcentral.com/>
 - i. Modern States Education Alliance (MSEA), <https://modernstates.org>
5. **Other programs and tools to assist Soldiers.**
- a. Apprenticeship, <https://www.apprenticeship.gov/employers/registered-apprenticeship-program>
 - b. Onward to Opportunity (O2O), <https://ivmf.syr.acuse.edu/onward-to-opportunity/>
 - c. The College Financing Plan, <https://www2.ed.gov/policy/highered/guid/aid-offer/index.html>
6. **CLEP and DSST Exams.** ARNG Soldiers can save time and money by earning college credit and/or promotion points via the College Level Examination Program (CLEP) and DANTES Standardized Subject Tests (DSST). These tests are reimbursed by the Defense Activity for Non Traditional Education Support (DANTES). States are encouraged to coordinate with DANTES to have local test sites waive sitting fees in order to eliminate Soldier out of pocket costs. Detailed information on the eligibility requirements, study guides, and preparation materials as well as steps on how to apply is available in the ARNG Education Handbook and on the DANTES website at: www.dantes.doded.mil.
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ACRONYMS

ABCMR	Army Board of Corrections for Military Records
ADOS	Active Duty for Operational Support
ADSO	Active Duty Service Obligation
AFCT	Armed Forces Classification Test
AGR	Active Guard Reserve
AOC	Advanced Operations Course
APFT	Army Physical Fitness Test
APT	Army Personnel Testing
ASMB	Active Service Management Board
ASVAB	Armed Services Vocational Aptitude Battery
ATCO	Assistant Test Control Officer
ATRRS	Army Training Requirements and Resources System
BCT	Basic Combat Training
BEAST	Benefits for Education Administrative Services Tool
BSEP	Basic Skills Education Program
CA	Credentialing Assistance
CASP	Civilian Acquired Skills Program
CLEP	College Level Examination Program
CoE	Certificate of Eligibility
DANTES	Defense Activity for Non-Traditional Education Support
DEERS	Defense Enrollment Eligibility Reporting System
DFAS	Defense Finance and Accounting Service
DMDC	Defense Manpower Data Center
DMOSQ	Duty Military Occupational Specialty Qualified
DoD	Department of Defense
DoDD	Department of Defense Directive
DoDI	Department of Defense Instruction
DoDM	Department of Defense Manual
DPRO	Directors Personnel Readiness Overview
DSST	DANTES Standardized Subject Test
DVA	Department of Veterans Affairs
EIOM	Education and Incentives Operational Messages
E-SERB	Enhanced Selective Early Retirement Boards
ESC	ARNG Education Support Center
ESED	Eligibility Status Effective Date
ESO	Education Services Officer
ESS	Education Services Specialist

ETP	Exception to Policy
ETS	Expiration Term of Service
FTA	Federal Tuition Assistance
GCRC	Guidance Counselor Resource Center
GED	General Education Development
GIMS	Guard Incentive Management System
MS TEAMS	Guard Knowledge Online
GMAT	Graduate Management Admission Test
GRE	Graduate Record Examination
GRFD	Guaranteed Reserve Forces Duty
IADT	Initial Active Duty Training
IAW	In Accordance With
IDES	Integrated Disability Evaluation System
IM	Incentive Manager
ING	Inactive National Guard
iPERMS	Interactive Personnel Electronic Records Management System
IPPS-A	Integrated Personnel and Pay System - Army
IRR	Individual Ready Reserve
JST	Joint Services Transcript
MEB	Medical Evaluation Board
MEPS	Military Entrance Processing Station
MGIB-AD	Montgomery GI Bill Active Duty
MGIB-SR	Montgomery GI Bill Selected Reserve
MHA	Monthly Housing Allowance
MILTECH	Military Technician
MRD	Mandatory Release Date
NGB	National Guard Bureau
NPS	Non-Prior Service
OASC	Online Academic Skills Course
OCS	Officer Candidate School
OED	Obligation End Date
OMPF	Official Military Personnel File
PEB	Physical Evaluation Board
PS	Prior Service
QMP	Qualitative Management Program
QRB	Qualitative Retention Board
RCCC	Reserve Component Career Counselor
RCCPDS	Reserve Components Common Personnel Data System
RCP	Retention Control Point
RDSO	Reserve Duty Service Obligation

REFRAD	Release from Active Duty
ROTC	Reserve Officers Training Corps
SELRES	Selected Reserve
SERB	Selective Early Retirement Board
SESS	Supervisory Education Service Specialist
SFPA	Suspension of Favorable Personnel Actions
SIDPERS	Standard Installation and Division Personnel Reporting System
SM	Service Member or Service Members (as applicable)
SLRP	Student Loan Repayment
SRIP	Selected Reserve Incentive Program
TAG	The Adjutant General
TCO	Test Control Officer
TEB	Transfer of Education Benefits
TERA	Temporary Early Retirement Authority
WOC	Warrant Officer Candidate

GLOSSARY

Active status – Currently serving in the ARNG in either a M-DAY (Drilling) or AGR status.

Child/Children – a natural, adopted, or step-child listed in DEERS. A ward is not considered an eligible child for the purposes of TEB.

Dependent – a DEERS-eligible spouse or child. A ward is not an eligible dependent.

milConnect – The online portal that houses the TEB request website.

OED – Obligation End Date. The end date of the four-year service obligation incurred when requesting TEB; the date the Service Member must serve until to retain TEB.

SELRES – Selected Reserve. Includes the Army and Air National Guard, and the Reserve Components of the Army, Navy, Air Force, Marine Corps and Coast Guard.

TEB – Transfer of Education Benefits. Referred to as Transfer of Entitlements (TOE) by the DVA.

TEB Website – The webpage within the milConnect portal where a SM applies to transfer benefits. <https://www.dmdc.osd.mil/milconnect>