



Department of Defense INSTRUCTION

NUMBER 1322.17

November 29, 1999

ASD(RA)

SUBJECT: Montgomery GI Bill-Selected Reserve (MGIB-SR)

- References:
- (a) Assistant Secretary of Defense for Reserve Affairs Memorandum, "Montgomery GI Bill-Selected Reserve Educational Assistance Allowance Increase," September 9, 1997
 - (b) DoD Instruction 1322.17, "Montgomery GI Bill for the Selected Reserve," November 21, 1991 (hereby canceled)
 - (c) Title 10, United States Code
 - (d) [DoD Instruction 7730.54](#), "Reserve Components Common Personnel Data System (RCCPDS)," March 15, 1999
 - (e) through (k), see enclosure 1

1. REISSUANCE AND PURPOSE

This Instruction:

1.1. Supersedes reference (a).

1.2. Reissues reference (b) to implement policy and update responsibilities and procedures for the management of educational benefits under Chapter 1606 of reference (c).

2. APPLICABILITY AND SCOPE

This Instruction applies to:

2.1. The Office of the Secretary of Defense, the Military Departments (including the Coast Guard when it is not operating as a Military Service in the Navy by agreement with the Department of Transportation (DoT)). The term "Military Services," as used herein, refers to the Army, the Navy, the Air Force, and the Marine Corps.

2.2. The Department of Veterans Affairs (VA) (by agreement with the Secretary of Veterans Affairs).

3. DEFINITIONS

Terms used in this Instruction are defined in enclosure 2.

4. POLICY

It is DoD policy under 10 U.S.C. (reference (c)) that the MGIB-SR shall be used to encourage and sustain membership in the SR.

5. RESPONSIBILITIES

5.1. The Assistant Secretary of Defense for Reserve Affairs under the Under Secretary of Defense for Personnel and Readiness shall:

5.1.1. Develop and promulgate DoD procedures to implement policy for the MGIB-SR authorized by Chapter 1606 of reference (c).

5.1.2. Coordinate administrative procedures with the VA, as applicable.

5.1.3. Establish policy, develop procedures, and coordinate requirements with the VA and the other Agencies for recoupment of MGIB-SR benefits paid to former SR Service members who have failed to participate satisfactorily in required training as a member of the SR during a term of enlistment or other period of obligated service that created entitlement of the member to educational assistance under Chapter 1606 of reference (c).

5.1.4. Establish reporting requirements for the Secretaries of the Military Departments and the Commandant of the Coast Guard, and shall ensure that all reports and data are submitted as directed.

5.1.5. Ensure that the Military Services develop adequate plans for certifying entitlement to educational assistance.

5.1.6. Review and approve each Military Department plan to use the MGIB-SR Kicker incentive to overcome personnel shortages in critical specialties, skills and units.

5.1.7. Establish the standard data elements needed to administer the MGIB-SR Program.

5.2. The Director, Defense Manpower and Data Center, under the Under Secretary of Defense for Personnel and Readiness shall:

5.2.1. Operate and maintain a database containing the following:

5.2.1.1. Records of all SR members entitled or not entitled to program benefits. SR categories shall be coded, in accordance with DoD Instruction 7730.54 (reference (d)).

5.2.1.2. All personnel information needed by the VA to determine benefit entitlement.

5.2.2. Provide statistical data annually to the Assistant Secretary of Defense for Reserve Affairs (ASD(RA)) including, at a minimum, the following:

5.2.2.1. The number of newly entitled Service members for the previous fiscal year (FY) for each Reserve component.

5.2.2.2. The amount of funds disbursed by the VA in payment of benefits for the previous FY for each Reserve component listed by MGIB-SR basic benefit and MGIB-SR Kicker incentive.

5.2.3. Provide each Reserve component with monthly program utilization data reported to the Defense Manpower Data Center (DMDC) by the VA.

5.2.4. Provide each Reserve component, at least monthly, with a feed-back report by Social Security Number (SSN) that identifies blank, invalid, or incorrect MGIB-SR data transmitted to the DMDC through the Reserve Component Common Personnel Data System (RCCPDS).

5.2.5. Provide to the VA, at least weekly, an update to the MGIB-SR database consisting of gains and losses, and other status changes reported during the previous week.

5.2.6. Provide to the Secretary of each Military Department and the Commandant of the Coast Guard, at least quarterly, a report of all Service members who have failed to participate satisfactorily in one Reserve component while being shown as eligible in another Reserve component.

5.2.7. Coordinate with the VA, to provide to the Defense Finance and Accounting Service, data necessary to accomplish recoupment of unearned MGIB-SR basic and MGIB-SR Kicker benefits from Service members who fail to participate satisfactorily in the SR.

5.2.8. Maintain the date of the Service member's original 6-year enlistment contract. If a 6-year contract is dated before October 1, 1990, and a subsequent 6-year contract, dated October 1, 1990, or later, has also been entered through the RCCPDS, then both dates shall be maintained in the MGIB-SR database. The date of a 6-year contract to establish eligibility for the MGIB-SR Kicker shall be maintained separately.

5.3. The Secretaries of the Military Departments and the Commandant of the Coast Guard shall:

5.3.1. Publish regulations, policies, and instructions governing the administration of the MGIB-SR Program under Chapter 1606 of 10 U.S.C. (reference (c)), consistent with this Instruction.

5.3.2. Monitor the use of Department of Defense (DD) Form 2384-1, "Notice of Basic Eligibility (NOBE)," and review its issuance at least semiannually to ensure that the form is not vulnerable to fraudulent use. Electronic generation of DD Form 2384-1 is authorized with the stipulation of controlled password protection.

5.3.3. Ensure that Service members who become entitled to MGIB-SR are advised of their entitlement to benefits and issued a DD Form 2384-1 within 30 days of attaining entitlement. Only one DD Form 2384-1 shall be issued to each entitled Service member and it shall become a permanent part of the official military record. Inform Service members enrolled in an education program immediately after attaining entitlement to allow approximately 120 days for processing and issuance of the first payment by the VA.

5.3.4. Conduct publicity campaigns to ensure wide dissemination of MGIB-SR information.

5.3.5. Budget for and transfer funds to support the MGIB-SR program, in accordance with paragraph 6.11., below, and guidance issued by the Under Secretary of Defense (Comptroller).

5.3.6. Train all MGIB-SR administrative personnel on procedures for counseling Service members; issuing, certifying, and safeguarding DD Form 2384-1; and maintaining records associated with the MGIB-SR Program (including input of MGIB-SR entitlement information into Service personnel systems).

5.3.7. Maintain MGIB-SR data on all SR Service members, in accordance with DoD Instruction 7730.54 (reference (d)).

5.3.8. Verify information on all Service members who have failed to participate satisfactorily in required training as members of the SR and report their entitlement status to the DMDC.

5.3.9. Coordinate with other Reserve components to resolve differences when Service members have failed to participate satisfactorily in one Reserve component and are reported as entitled to benefits by another Reserve component. When resolved, immediately update the Service member's eligibility status.

5.3.10. Determine the need to offer a MGIB-SR Kicker to overcome personnel shortages in critical specialty skills and or units. Plans from each Military Department shall be submitted to the ASD(RA) for approval by July 31 of the year preceding the FY the Military Department intends to offer the MGIB-SR Kicker. The Secretary of Transportation is the approval authority for the MGIB-SR Kicker utilization plan developed by the Commandant of the Coast Guard. A copy of the approved Coast Guard Reserve plan shall be forwarded to the ASD(RA) by the July 31 suspense date. All plans shall identify the specialties, skills, and units deemed to be critical; provide justification for the designations; include other incentives to be offered for application to the specialties, skills and units; estimate the number of participants; designate the MGIB-SR Kicker level to be offered; and establish management and evaluation plans.

6. PROCEDURES

6.1. Service members of the SR who meet the following criteria are entitled to educational assistance:

6.1.1. Enlist, reenlist, or extend an enlistment in a Reserve component for service in the SR, on or after July 1, 1985, for a period of not less than 6 years or, in the case of officers, agree to serve in the SR for 6 years besides any other period of obligated service in the SR to which the officer may be subject.

6.1.2. Complete the Initial Active Duty Training (IADT) requirements of the Armed Force in which serving. Individuals must complete the IADT requirements for mobilization prescribed by the Secretary concerned to become eligible for educational assistance.

6.1.3. Complete the requirements for the award of a high school diploma or equivalency certificate before completing IADT or, in the case of an individual reenlisting or extending an enlistment, complete that educational requirement before such reenlistment or extension. Under regulations prescribed by the Secretary concerned, nonprior service enlistees shall furnish evidence satisfying that requirement (such as a diploma or certificate of completion) within 60 days of the date they complete IADT.

6.2. Entitlement status of SR members shall be reported through the RCCPDS to the DMDC within 30 days of attaining entitlement.

6.3. Service members of the SR who meet the following criteria are eligible for the MGIB-SR Kicker:

6.3.1. Enlist, reenlist, or extend his or her current enlistment to serve a period of not less than 6 years in the SR in a Reserve component currently offering the MGIB-SR Kicker.

6.3.2. Qualify for and be assigned to a Service-designated critical specialty, skill, or unit in the SR.

6.3.3. Be in receipt of benefits under Section 16132 of 10 U.S.C., or Sections 3011- 3012 of 38 U.S.C. (references (c) and (e)).

6.4. An MGIB-SR Kicker addendum shall be completed and signed at the time of the enlistment, reenlistment, or extension that begins the 6-year obligation period for a Service member who is granted an MGIB-SR Kicker. Attachment E6.A1. to enclosure 6 shall be used as a guide in preparing that addendum. Service-specific agreements shall include all of the elements in the model agreement provided.

6.5. Benefit

6.5.1. A Service member who meets the criteria in paragraph 6.1., above, and enrolls in a VA-approved course of study is eligible for educational assistance under Chapter 1606 of 10 U.S.C. (reference (c)). Service members must apply to the VA for payment of benefits. Enclosure 4 contains application procedures.

6.5.2. Educational assistance may be provided for the pursuit of any program of education that is an approved program of education under Section 3452(b) of 38 U.S.C. (reference (e)). To be entitled to educational assistance under the vocational and/or technical programs, the enlistment, reenlistment, extension, or agreement to serve must be executed on or after October 1, 1990.

6.5.3. Educational assistance is authorized for VA-approved programs such as institutions of higher learning, both graduate (subject to availability of funds) and undergraduate programs, on-the-job training (OJT), apprenticeships, correspondence courses, independent study, tutorial assistance, cooperative programs, vocational training, and flight training. Payment schedules and rates are in enclosure 5.

6.5.4. Benefits are paid for a maximum of 36 months based upon full-time enrollment. Benefits are also paid for three-quarter time, half-time, or at an applicably reduced rate, as determined by the Secretary of the VA, for each month of less than half-time. No payment may be made to a Service member for less than half-time pursuit if tuition assistance is otherwise available for such pursuit from the Military Department concerned.

6.5.5. The Secretary concerned may offer the MGIB-SR Kicker to eligible Service members at the monthly rates of \$100, \$200, or \$350. MGIB-SR incentive payments shall not exceed \$350 each month.

6.5.6. The Secretary concerned determines the amount of the MGIB-SR Kicker additional monthly benefit for eligible Service members under constraints established by Section 16131 of reference (c) and the Secretary of Defense. MGIB-SR Kicker benefits shall be paid for a maximum of 36 months based on full-time pursuit. Monthly benefits for less than full-time pursuit shall be adjusted like the MGIB-SR basic benefit, as determined by the Secretary of the VA. Service members of the SR who are eligible for the MGIB-SR Kicker under paragraph 6.3., above, and who are also eligible for educational assistance under Chapter 30 of reference (e) and meet the eligibility criteria specified in subparagraphs (a) and (b) of Section 16132(a)(1) of reference (c) and who have received a DD 2384-1, may receive the MGIB-SR Kicker up

to the maximum amount. The Service member must be receiving basic benefits under Section 16131 of reference (c) or Section 3011 of reference (e) to receive MGIB-SR Kicker benefits.

6.5.7. After completing 6 years in the SR, the Service member may transfer to another specialty, skill, unit, and/or Reserve component and retain eligibility for the MGIB-SR Kicker benefit. To retain eligibility, the Service member must be entitled to educational assistance under Chapter 1606 of 10 U.S.C. or Chapter 30 of 38 U.S.C. (references (c) and (e)) and not have exhausted the full-time equivalent of 36 months of MGIB-SR Kicker benefits.

6.6. Bar to Duplication of Educational Assistance

6.6.1. A Service member cannot receive MGIB-SR basic and/or MGIB-SR Kicker benefits while concurrently receiving assistance in whole or in part from any other Federal source, as listed in Section 3681 of reference (e), when the payment constitutes a duplication of benefits. Receipt of tuition assistance under Section 2007 of reference (c) and MGIB-SR benefits does not constitute duplication when Service members are enrolled in a half-time, or greater, program of education.

6.6.2. A Service member cannot use the same period of service to establish entitlement under both Chapter 1606 of reference (c) and Chapter 30 of reference (e). Because of separate periods of service, a Service member may satisfy the entitlement criteria for both programs. A Service member cannot receive basic benefit payments from both Chapter 1606 of reference (c) and Chapter 30 of reference (e) programs for the same month of education. The maximum aggregate period for VA-administered educational assistance under two or more provisions of law is 48 months (or its part-time equivalent). In those cases, Service members may exhaust their entitlement under one provision, then continue receiving education assistance under another provision until the aggregate 48 months of entitlement has been used.

6.6.3. A prior active duty (AD) Service member qualified for an increase in educational allowance (such as the Army College Fund, the Navy College Fund, the Marine Corps College Fund, or the Coast Guard College Fund) under Section 3015 of reference (e), shall receive increased benefits under both references (e) and the MGIB-SR Kicker (under Chapter 1606 of 10 U.S.C. of reference (c)) simultaneously, if qualified.

6.7. Period of Entitlement

6.7.1. The 10-year entitlement period begins on the date the Service member meets the criteria of paragraph 6.1., above.

6.7.2. Entitlement for educational assistance expires upon the first occurrence of one the following:

6.7.2.1. The Service member exhausts the authorized months of entitlement benefits; or,

6.7.2.2. The end of a 10-year period beginning on the date of eligibility specified on the DD Form 2384-1 of the Service member, except as indicated in subparagraph 6.7.6., below; or,

6.7.2.3. The time the Service member is separated from the SR, except as indicated in subparagraph 6.7.3., below.

6.7.3. Entitlement to educational assistance is suspended for the following:

6.7.3.1. On the date the Service member is granted an authorized period of absence and transfers to the Individual Ready Reserve, the Inactive National Guard, or the SR of another Reserve component except as cited in subparagraphs 6.7.6.1. and 6.7.6.2., below. Suspensions shall apply to both MGIB-SR basic benefits and MGIB-SR Kicker payments. Authorized periods of absence shall not exceed one 3-year period for a missionary obligation or one period not to exceed 1 year for all other circumstances.

6.7.3.2. When a Service member with a date of basic entitlement of November 29, 1989, or later, enters AD in an Active Guard and Reserve (AGR) or a Full-Time National Guard Duty (FTNGD) status. Those individuals are normally entitled to educational benefits under Chapter 30 of 38 U.S.C. (reference (e)).

6.7.3.3. On the date the Service member fails to participate satisfactorily, as defined in DoD Instruction 1215.18 (reference (f)), and the Service member is pending a final determination of failing to participate satisfactorily under paragraph 6.8., below.

6.7.3.4. For the MGIB-SR Kicker, on the date that the Service member voluntarily departs the position or unit for which he or she received MGIB-SR Kicker eligibility, if the Service member departs during the 6-year SR obligation period required for MGIB-SR Kicker eligibility. If the Service member remains in the SR in a non-Kicker position, only MGIB-SR Kicker payments are suspended. There shall be

only one suspension of MGIB-SR Kicker payments, not to exceed 1 year, where the Service member has not completed the 6-year obligation period and remains in the SR. After completion of the 6-year obligation period, suspensions of the MGIB-SR Kicker shall be for periods of authorized absence granted in connection with the MGIB-SR basic entitlement only.

6.7.3.5. When a Service member receives financial assistance in the form of a Senior Reserve Officers Training Corps Scholarship under Section 2107 of 10 U.S.C (reference (c)). Note that recipients of Reserve Forces Duty scholarships under Section 2107a of reference (c) shall receive MGIB-SR benefits, if otherwise eligible.

6.7.4. Suspended entitlement to educational assistance shall be restored for the following:

6.7.4.1. When the Service member reaffiliates in the SR before the expiration of an authorized period of absence subject to the limitations described in subparagraph 6.7.3.1., above, or within 1 year of release from AD in an AGR status, provided the Service member commits to serve in the SR for a period that, with time already served for entitlement of the Service member to MGIB-SR benefits under this instruction, shall equal 6 years.

6.7.4.2. If the Service member is determined to have participated satisfactorily.

6.7.4.3. For the MGIB-SR Kicker, when, during the 6-year SR obligation period that established eligibility for the MGIB-SR Kicker, a Service member returns to the same Reserve component in a critical specialty, skill, and/or critical unit for which the MGIB-SR Kicker was granted. If the Service member returns to a different specialty, skill, or unit than the MGIB-SR Kicker was originally granted, the specialty, skill, or unit must be on the list of currently designated critical specialties, skills, or units in the Reserve component that granted the MGIB-SR Kicker. The Service member must return within 1 year, unless granted an authorized period of nonavailability of 3 years for a missionary obligation, and the Service member must commit to serve in the critical specialty, skill, or unit for a period that, in combination with time already served in a critical specialty, skill, or unit that qualified the Service member for the MGIB-SR Kicker, shall equal 6 years. Eligibility for the MGIB-SR Kicker that is suspended after the 6-year SR obligation period shall be restored on reaffiliation in the SR in any position or unit of any Reserve component.

6.7.5. Entitlement to educational assistance shall be terminated as follows:

6.7.5.1. A final determination of failure to participate satisfactorily is made, in accordance with paragraph 6.8., below.

6.7.5.2. A Service member fails to reaffiliate in the SR before the expiration of an authorized period of absence.

6.7.5.3. A Service member fails to reenlist or extend to restore entitlement on reaffiliation, in accordance with subparagraph 6.7.4.1., above, before the expiration of an authorized period of absence.

6.7.5.4. A Service member is discharged from Military Service for reasons other than immediate reenlistment or one of the exceptions under subparagraph 6.7.6., below.

6.7.5.5. For the MGIB-SR Kicker, an eligible Service member fails to reaffiliate, in accordance with subparagraph 6.7.4.3., above.

6.7.6. Entitlement may be continued or extended under Section 16133(b) of 10 U.S.C. (reference (c)) as follows:

6.7.6.1. A Service member is separated from the SR because of a disability that was not the result of individual willful misconduct, and was incurred on or after the date that the Service member became entitled to educational assistance under this Instruction. The Service member shall retain entitlement through the end of the 10-year period described in subparagraph 6.7.2., above;

6.7.6.2. A Service member is separated from the SR between October 1, 1991, and September 30, 2001, or any future date established by law, because of the inactivation of the unit of assignment or because of a reduction in authorized strength, as determined by the Secretary concerned. The Service member shall retain entitlement through the original 10-year period described in subparagraph 6.7.2., above.

6.7.6.3. A Service member is prevented from pursuing a chosen program because of a physical or mental disability, that was not the result of individual willful misconduct. The Service member may apply for an extension of the 10-year period. To extend entitlement, the Service member must apply to the VA within 1 year after either the last day of the 10-year period or the last day the individual was so prevented from pursuing such program, whichever is later.

6.7.6.4. A Service member is enrolled in an educational institution and the period of entitlement expires under subparagraph 6.7.2., above. The Service member

shall be extended to the end of that quarter or semester. If the Service member is enrolled in an institution not operated regularly on a quarter or semester basis and the period of entitlement expires after a major portion of the course is completed, the benefit period shall be extended to the end of the course, or for 12 weeks, whichever is the lesser period of extension.

6.7.6.5. A Service member is ordered to AD under an order issued under Sections 12301(a), 12301(d), 12301(g), 12302, or 12304 of 10 U.S.C. (reference (c)). His or her benefit period shall be extended for the period of AD plus 4 months. Those Service members shall not be considered separated from the SR during the period of activation. If the VA finds an order to AD caused a Service member to discontinue a course pursuit, and the Service member fails to receive credit or training time toward completion of the approved educational objective, the benefits paid for such a course shall not be counted toward the authorized months of entitlement of the Service member.

6.7.6.6. A Service member is precluded from filling the position for which he or she received MGIB-SR Kicker eligibility under subparagraphs 6.7.6.1. and 6.7.6.2., above, or is otherwise involuntarily precluded from fulfilling his or her commitment. The Service member shall retain MGIB-SR Kicker eligibility. Besides the circumstances described in subparagraphs 6.7.6.1. and 6.7.6.2., "involuntary removal" includes reclassification of a position to noncritical, transfers to another position at the convenience of the Government, and promotions in the specialty or skill career progression path that provided MGIB-SR Kicker eligibility. The Secretary concerned shall adjudicate questions of "voluntary" versus "involuntary removal."

6.8. Failure to Participate Satisfactorily in Required Training

6.8.1. Entitlement to MGIB-SR benefits shall be suspended on the date a Service member fails to participate satisfactorily, as determined by command authority. Failure to participate satisfactorily means failure to fulfill the contractual obligation or Service agreement as a Service member of the Ready Reserve, as defined in DoD Instruction 1215.18 (reference (f)). The Service member shall be notified by the Reserve component of the reason for loss of entitlement and given an opportunity to respond before a final determination is made and a termination of entitlement is processed. If a Service member is found to have failed to participate satisfactorily, termination of entitlement shall be effective on the date of the suspension of entitlement.

6.8.2. A Service member who has failed to participate satisfactorily before completing the 6-year obligation incurred to qualify for MGIB-SR entitlement and who

received educational assistance under Chapter 1606 of 10 U.S.C. (reference (c)) shall, at the option of the Secretary concerned:

6.8.2.1. Be ordered to AD for up to 2 years or the period of obligated service incurred under this instruction and remaining at the time of failure to participate satisfactorily, whichever is less;

6.8.2.2. Be required to refund to the United States an amount equal to the number of months of SR service the person has remaining under the MGIB-SR obligation, divided by the original number of obligated months required for MGIB-SR entitlement; and multiplied by the total amount of educational assistance provided to the Service member under Chapter 1606 of reference (c). The amount of the refund computed shall bear interest at the rate equal to the highest rate being paid by the United States on the day on which the refund is determined to be due for securities having maturities of 90 days or less and shall accrue from the day on which the Service member is first notified of the amount due to the United States as a refund under this Instruction. Any such refund shall not affect the SR period of obligation of the Service member; or,

6.8.2.3. Be granted a waiver of the requirement to serve on AD, a waiver of the total refund, or a waiver of a portion of the total refund. Waiver authority may be delegated no lower than the head of the Reserve component concerned and shall be based on a determination that failure to participate satisfactorily in required training was due to reasons beyond the control of the Service member.

6.8.3. Subparagraph 6.8.2., above, also applies to recipients of MGIB-SR Kicker payments who have failed to participate satisfactorily before completing the Service obligation required for MGIB-SR Kicker eligibility. MGIB-SR Kicker payments are subject to recoupment whether received as a supplement to Chapter 30 of 38 U.S.C. (reference (e)) or Chapter 1606 of reference (c) basic benefits. If the MGIB-SR basic and Kicker 6-year obligation start dates are different, the recoupment formula is applied separately to the MGIB-SR basic benefit and to the MGIB-SR Kicker payment to determine the total amount of refund. Delinquent repayment is subject to interest charges, as described in subparagraph 6.8.2.2., above.

6.9. Recoupment of a benefit amount, as defined in subparagraph 6.8.2.2., above, shall not occur in the case of the death of the Service member.

6.10. Information and instructions for recoument against members of U.S. Coast Guard Reserve may be found in Commandant Instruction 1001.30E, subject: Montgomery GI Bill-Selected Reserve Educational Assistance Program.

6.11. Information on funding policies and procedures for the MGIB-SR may be found in DoD 7000.14-R, Volume 12, Chapter 15 (reference (g)).

7. INFORMATION REQUIREMENTS

7.1. The Military Services shall provide MGIB-SR data to the Director, DMDC, under the requirements established in subparagraph 5.3.7., above.

7.2. The Director, DMDC, shall request that the VA provide information as required by subparagraph 5.2.7., above.

7.3. Until Service data systems can be modified to include added data elements necessary to report and track MGIB-SR Kicker eligibility, the Services shall submit an ASCII file monthly to the DMDC. The DMDC shall consolidate data from the Services and pass eligibility information to the VA as required by subparagraph 5.2.5., above, using the best means available.

7.4. The Services shall take steps to modify their data systems to include those data elements to facilitate reporting through the RCCPDS.

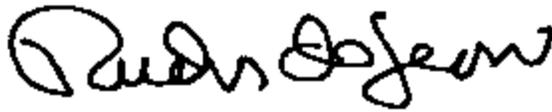
7.5. Routine exchanges of information between the VA, the DoT, and the Department of Defense, identified in this Instruction, are exempt from interagency report control licensing in accordance with subparagraph C5.5.2.2. of DoD 8910.1-M (reference (h)).

7.6. The MGIB-SR Kicker plans (and implementing procedures) prepared in accordance with this instruction are exempt from the review and approval procedures of reference (h) in accordance with paragraph C4.4.4. of reference (h).

7.7. DD Form 2384-1, is an operating document and exempt from the review and approval procedures of reference (h), in accordance with paragraph C4.4.2. of reference (h).

8. EFFECTIVE DATE

This Instruction is effective immediately.

A handwritten signature in black ink, appearing to read "Rudy de Leon". The signature is written in a cursive, flowing style.

Rudy de Leon
Deputy Secretary of Defense

Enclosures - 6

- E1. References, continued
- E2. Definitions
- E3. DD Form 2384-1
- E4. Individual Application Procedures
- E5. MGIB-SR Benefits and Payment Schedule
- E6. MGIB-SR Kicker Obligation Addendum Guidance

E1. ENCLOSURE 1

REFERENCES, continued

- (e) Title 38, United States Code
- (f) [DoD Instruction 1215.18](#), "Reserve Component Member Participation Requirements," January 11, 1996
- (g) DoD 7000.14-R, "Department of Defense Financial Management Regulation," Volume 12, "Special Accounts Funds and Programs," February 1999
- (h) [DoD 8910.1-M](#), "DoD Procedures for Management of Information Requirements," June 30, 1998
- (i) [DoD Instruction 1215.19](#), "Uniform Reserve, Training and Retirement Category Administration," March 14, 1997
- (j) Title 32, United States Code
- (k) VAPamphlet 22-90-3, "Summary of Educational Benefits Under the Montgomery GI Bill - Selected Reserve Educational Assistance Program," Chapter 1606 of title 10, United States Code¹

¹ Available from the Defense Activity for Non-Traditional Education Support, 6490 Saufley Field Road, Pensacola, FL 32509-5243.

E2. ENCLOSURE 2

DEFINITIONS

E2.1. TERMS

The following terms are used in the Instruction:

E2.1.1. Active Duty (AD). Full-time duty in the active Military Service of the United States including full-time training duty, annual training duty, and attendance, while in the active Military Service, at a school designated as a Service school by law or by the Secretary of the Military Department concerned. It does not include FTNGD.

E2.1.2. Active Guard and Reserve (AGR) Status. AD performed by a Service member of the Reserve components of the Army, the Navy, the Air Force, or the Marine Corps, the Coast Guard, or the FTNGD performed by a Service member of the National Guard, under an order to AD or FTNGD for a period of 180 consecutive days or more for organizing, administering, recruiting, instructing, or training the Reserve components. Personnel performing such duty are included in the Full-Time Support numbers for each Reserve component under the collective title of AGR. That includes the Navy Training and Administration of Reserves, the Marine Corps Active Reserves, and the Coast Guard Reserve Program Administrators.

E2.1.3. Annual Training (AT). The minimum period of training that Reserve Service members must perform each year to satisfy the training requirements associated with their Reserve component assignment. The primary purpose of AT is to provide individual or unit readiness training, but AT may support AD missions and requirements; i.e., operational support, thereby adding substance to the Total Force.

E2.1.4. DD Form 2384-1, "Notice of Basic Eligibility (NOBE)". DD Form 2384-1 is issued to a Service member certifying entitlement to MGIB-SR benefits.

E2.1.5. Education Benefits Fund (EBF). A fund administered by the Secretary of the Treasury and used for the accumulation of funds to finance DoD education liabilities on an actuarially sound basis. The Secretary of the Treasury transfers from the fund to the Secretary of VA the amounts necessary to enable the Secretary of VA to make required payment for benefits under Chapter 30 of 38 U.S.C. and for benefits under Chapter 1606 of 10 U.S.C. (references (e) and (c)).

E2.1.6. Equivalency Certificate. A credential awarded based on successful completion of any of the following: General Education Degree (GED) certificate; high

school diploma based on GED; correspondence school; California High School Proficiency Examination; high school attendance certificate; high school completion certificate; adult education certificate or diploma; or "external" or competency-based diploma.

E2.1.7. Established Charge. The charge for a course determined on the basis of the lowest extended time payment plan offered by the institution and approved by the appropriate State-approving agency; or, the actual charge to the Service member for the course; whichever is less.

E2.1.8. Failure to Participate Satisfactorily. Failure to fulfill the contractual obligation or Service agreement as a Service member of the Ready Reserve, as defined in DoD Instruction 1215.18 (reference (f)).

E2.1.9. High School Diploma. A certificate granted to an individual who successfully completes a secondary school program.

E2.1.10. High School Equivalency. Certification that an individual has fulfilled the requirement of high school graduation as determined by a State board of education, or the successful completion of 12 semester or 22 quarter hours of college credit.

E2.1.11. Inactive Duty Training. Authorized training performed by a Service member of a Reserve component not on AD, or AD for training, and consisting of regularly scheduled unit training periods, annual training programs, or equivalent training, and performed by the Service member with the prescribed activities of the Reserve component of which he or she is a Service member.

E2.1.12. Initial Active Duty Training (IADT). A subcategory of ADT used to provide basic military training and technical skill training required for all accessions. A complete definition for IADT is in DoD Instruction 1215.19 (reference (i)).

E2.1.13. MGIB-SR Educational Assistance Allowance Increase for Critical Skills (MGIB-SR Kicker). A supplemental educational incentive of up to \$350 for each month that the Military Services may offer to encourage MGIB-SR eligible Service members to fill critical specialties, skills, or units. Eligible Service members elect to receive the MGIB-SR Kicker payment as a supplement to either Chapter 1606 of 10 U.S.C. (reference (c)) basic benefits or, if entitled, to Chapter 30 of 38 U.S.C. (reference (e)) basic benefits.

E2.1.14. Reaffiliation. When a former SR Service member returns to the SR after an authorized period of nonavailability.

E2.1.15. Recoupment. The process of obtaining a refund of unearned benefits paid to a Service member who has failed to participate satisfactorily before completing the 6-year SR Service obligation required to gain entitlement to educational assistance under Chapter 1606 of reference (c) and/or before completing the 6-year SR obligation required to be granted eligibility for the MGIB-SR Kicker under Chapter 1606 of reference (c).

E2.1.16. Refund. A portion of the educational benefits received by a Service member, and owed to the United States Government, for failure to satisfactorily complete a SR Service obligation for receipt of educational benefits under Chapter 1606 of reference (c). Refunds of basic benefits and MGIB-SR Kicker payments under Chapter 1606 of reference (c) are computed separately since the 6-year SR obligation periods may be different. Refunds are computed by multiplying the benefit received by the percent of the 6-year SR Service obligation not completed. Refund amounts for basic benefits and MGIB-SR Kicker payments are added together for the total amount of refund to be processed for recoupment.

E2.1.17. Secretary Concerned. Refers to the Secretary of each Military Department, under regulations prescribed by the Secretary of Defense, and to the Secretary of Transportation, under regulations that he or she prescribed for the Coast Guard when it is not operating as a Service in the Navy.

E2.1.18. Selected Reserve (SR). A category of the Ready Reserve in each of the Reserve components. The SR consists of units, and, as designated by the Secretary concerned, of individual Reserve Service members, trained as prescribed in 10 U.S.C (reference (c)) or 32 U.S.C. (reference (j)), as applicable.

E2.1.19. Suspension. A period of time when MGIB-SR educational assistance temporarily ceases pending a final determination of failing to participate satisfactorily, reaffiliation with the SR or, for the MGIB-SR Kicker, return to a critical skill or unit for which the MGIB-SR Kicker was granted.

E2.1.20. Vocational-Technical Training. Consists of approved programs of instruction in the following:

E2.1.20.1. OJT and apprenticeship training.

E2.1.20.2. Correspondence courses.

E2.1.20.3. Independent study.

E2.1.20.4. Cooperative study.

E2.1.20.5. Flight training.

E2.1.20.6. Other vocational and/or technical training at a noncollege degree facility.

E2.1.20.7. Tutorial assistance.

E3. ENCLOSURE 3

DD FORM 2384-1

E3.1. PURPOSE

The DD Form 2384-1 shall be used to satisfy the written notice requirement established in the Instruction. DD Form 2384-1 must be safeguarded and issued only when an individual becomes entitled to the educational assistance benefits described in section 6. of the Instruction.

E3.2. PREPARATION

E3.2.1. DD Forms 2384-1 are important records of Military Service that must be prepared accurately and completely. The recipient must be informed that making any unauthorized change or alteration to a DD Form 2384-1 shall render it void. A corrected copy may be issued to correct an erroneous date of basic entitlement and shall be clearly marked "CORRECTED COPY."

E3.2.2. The instructions for preparation of DD Form 2384-1 are applicable regardless of how the form is generated. Instructions for completion are, as follows:

E3.2.2.1. Name. Name of the Service member.

E3.2.2.2. Social Security Number (SSN). Self-explanatory.

E3.2.2.3. Date of Basic Entitlement. The date on which the Service member has met all eligibility requirements.

E3.2.2.4. Reserve Component. Use the following abbreviations to identify the Reserve component of the Service member:

E3.2.2.4.1. The Army National Guard of the United States (ARNGUS).

E3.2.2.4.2. The United States Army Reserve (USAR).

E3.2.2.4.3. The Air National Guard of the United States (ANGUS).

E3.2.2.4.4. The United States Air Force Reserve (USAFR).

E3.2.2.4.5. The United States Naval Reserve (USNR).

E3.2.2.4.6. The United States Marine Corps Reserve (USMCR).

E3.2.2.4.7. The United States Coast Guard Reserve (USCGR).

E3.2.2.5. Unit Identification Code (UIC). The UIC of the unit to which the Service member is assigned when DD Form 2384-1 is issued.

E3.2.2.6. Unit Telephone. Self-explanatory.

E3.2.2.7. Home Mailing Address. Self-explanatory.

E3.2.2.8. Unit of Assignment. The designation of the military unit to which the Service member is assigned at the time DD Form 2384-1 is issued.

E3.2.2.9. Address of Unit of Assignment. Self-explanatory.

E3.2.2.10. Typed Name of Service Member, Grade, Signature, and Date Signed. The name of the Service member entry in this block must be identical to the name entered in the first block at the top of the DD Form 2384-1. The Service member must sign and date the DD Form 2384-1. The date signed may not predate the "Date of Basic Eligibility" entered at the top of the DD Form 2384-1.

E3.2.2.11. Typed Name of Commanding Officer, or Designee, Grade, Signature, and Date Signed. Self-explanatory; the date signed may not predate the "Date of Basic Eligibility" entered at the top of a DD Form 2384-1.

E3.2.3. A signed copy of a DD Form 2384-1 shall become a permanent document in the individual's personnel records. Additional signed copies may be locally reproduced, as required.

E3.3. MODIFICATION OF DD FORMS 2384-1

The modification of the content or format of a DD Form 2384-1 is not authorized. Requests to add or delete information must be coordinated with the other Military Services in writing before submission to the ASD(RA).

E3.4. HANDLING GUIDANCE

DD Forms 2384-1 are sources of information used by Governmental Agencies to validate veteran entitlement to educational assistance. As such, those forms are vulnerable to fraudulent use. Since DD Forms 2384-1 are sensitive, these forms must be safeguarded at all times. All DD Forms 2384-1 must be stored, transmitted, and destroyed in a manner that shall prevent unauthorized use. The Secretary concerned shall issue instructions consistent with the following:

E3.4.1. Secure DD Forms 2384-1 at all times.

E3.4.2. Destroy obsolete DD Forms 2384-1.

E3.4.3. Destroy all DD Forms 2384-1 to be discarded, including those that are blank or partially completed, and reproduced copies of the DD Form 2384-1. Do not discard any DD Forms 2384-1 intact.

E3.4.4. Include applicable safeguards in each personnel system to prohibit unauthorized or fraudulent use of DD Forms 2384-1, including electronically generated forms. Electronic generation of DD Form 2384-1 is authorized if the form is password-protected.

E3.4.5. The commander or the commanding officer of each unit or activity authorized to issue DD Forms 2384-1 must appoint individuals who shall requisition, control, and issue DD Forms 2384-1. The appointed individuals shall ensure that only one DD Form 2384-1 is issued to any Service member.

E3.5. SAMPLE DD Form 2384-1

Attachment E3.A1. to this enclosure contains a sample DD Form 2384-1.

Attachments - 1

E3.A1. Notice of Basic Eligibility

E3.A1. ATTACHMENT 1 TO ENCLOSURE 3

NOTICE OF BASIC ELIGIBILITY

NOTICE OF BASIC ELIGIBILITY (NOBE)			
PRIVACY ACT STATEMENT			
<p>AUTHORITY: 10 U.S.C., Sections 16131 through 16138; E.O. 9397. PRINCIPAL PURPOSE(S): Information will be used to establish entitlement by eligible members of the Selected Reserve to Montgomery GI Bill Educational Assistance benefits. ROUTINE USE(S): To the Department of Veterans Affairs, to substantiate eligibility for educational assistance under the Montgomery GI Bill. DISCLOSURE: Voluntary; however, failure to provide personal information may preclude processing of Notice of Basic Eligibility. COMPUTER MATCHING: Information provided on the Notice of Basic Eligibility is subject to a computer matching agreement between the Department of Defense and the Department of Veterans Affairs. Computer matching is employed to verify an individual's eligibility for and continuing compliance with Federal benefit programs, and in some instances is used to effect adjustments or recovery of improper payments made on delinquent debts owed by a beneficiary or former beneficiary.</p>			
1. SERVICEMEMBER DATA			
<p>a. NAME (Last, First, Middle Initial) SEPETA, ARTHUR J.</p>		<p>b. SSN 123-45-6789</p>	<p>c. DATE OF BASIC ELIGIBILITY (YYYYMMDD) 19981204</p>
<p>d. RESERVE COMPONENT USAR</p>	<p>e. UNIT IDENTIFICATION CODE (UIC) WZMNA</p>	<p>f. UNIT TELEPHONE NO. (Include Area Code) (615) 555-4536</p>	
<p>g. HOME MAILING ADDRESS (MOR) (Street, Apartment No., City, State, and ZIP Code) 1 GERONIMO DRIVE, APT 501, OAK GROVE, KY 42262-1836</p>		<p>h. UNIT OF ASSIGNMENT HHC, 1ST BN, 363 REGT, 28D DIVISION (IT) 1. UNIT ADDRESS (Street, Suite No., City, State, and ZIP Code) 101 SCREAMING EAGLE WAY, FORT CAMPBELL, KY 42223-1030</p>	
2. BASIC ELIGIBILITY CRITERIA			
<p>I meet the eligibility criteria for the Selected Reserve Educational Assistance program authorized in Chapter 1606 of title 10, U.S. Code, as follows:</p> <p>a. On or after October 1, 1990, I have agreed to serve six years in the Selected Reserve. If I am an officer, I agree to serve in the Selected Reserve for six years in addition to any other period of obligated Selected Reserve service I am required to perform.</p> <p>b. I have (or have completed the requirements for) a high school diploma or an equivalency certificate.</p> <p>c. I have completed Initial Active Duty for Training (IADT), if required.</p> <p>d. I am not receiving financial assistance under Section 2107 of title 10 U.S.C. (ROTC Scholarship).</p>			
3. SATISFACTORY PARTICIPATION			
<p>My basic eligibility to educational assistance benefits depends upon serving satisfactorily the complete 6-year term in the Selected Reserve as prescribed by military regulations. Failure to participate satisfactorily in required Reserve training means I will not be eligible for any benefits from the date of the unsatisfactory participation. If I fail to participate satisfactorily as a member of the Selected Reserve, I understand I will permanently lose all entitlements under this program and my obligations are:</p> <p>a. Ordered to involuntary active duty for a period of up to two years or the period of my obligated service remaining, whichever is less, or</p> <p>b. Required to refund to the United States part of the money received from the Department of Veterans Affairs (VA) plus accrued interest for educational assistance under the program. Any refund I may be required to make does not affect my obligation to complete my service agreement in the Selected Reserve.</p>			
4. MONTHLY ENTITLEMENTS			
<p>I am entitled to a maximum of 36 months of educational assistance based upon full-time pursuit (or the equivalent based upon less than full-time pursuit). Benefits to which I am entitled under this program will be paid by the VA. It is my personal responsibility to apply to the VA in order to receive benefits. I understand I may receive no more than 48 months of benefits under two or more VA programs.</p>			
5. AUTHORIZED NON-PARTICIPATION			
<p>If I am not able to continue to serve in the Selected Reserve for a valid reason approved by my Reserve component, following a period of satisfactory Reserve participation, I may be authorized up to one year of nonavailability, or up to three years in cases of a religious missionary obligation or with approval of the Service Secretary. I understand that I must reobligate for any approved period of nonavailability upon reaffiliation with a Reserve component. Failure to affiliate with the Selected Reserve at the end of this period will result in permanent ineligibility to benefits. Only one approved release is permitted during the 10 year benefit period.</p>			
6. EXPIRATION			
<p>My entitlements to unused educational assistance benefits will normally expire on the earlier of the following two dates:</p> <p>a. The 10th anniversary of eligibility to benefits if I remain a member in good standing during that period.</p> <p>b. On the date of separation from the Selected Reserve (except for those members separated from the Selected Reserve for a disability to no fault of their own, or involuntarily separated during the period of October 1, 1991 through September 30, 1999, due to inactivation of their unit or position. In such case benefits are retained for the entire ten-year period).</p>			
7. UNDERSTANDING			
<p>I have read and understand each of the statements above and acknowledge that they are intended to constitute official notice and certification of my eligibility for Selected Reserve educational assistance benefits. I understand that this entitlement does not take precedence over forced attrition due to total force management decisions. I certify that, to the best of my knowledge, the above information is true and correct.</p>			
a. SERVICEMEMBER			
<p>(1) NAME (Last, First, Middle Initial) SEPETA, ARTHUR J.</p>	<p>(2) GRADE E-2</p>	<p>(3) SIGNATURE <i>Arthur J. Sepeta</i></p>	<p>(4) DATE SIGNED 19981204</p>
b. COMMANDING OFFICER OR DESIGNEE			
<p>(1) NAME (Last, First, Middle Initial) HARPER, GARY P.</p>	<p>(2) GRADE O-3</p>	<p>(3) SIGNATURE <i>Gary P. Harper</i></p>	<p>(4) DATE SIGNED 19981204</p>

DD FORM 2384-1, JUN 1998

PREVIOUS EDITION IS OBSOLETE.

E4. ENCLOSURE 4
INDIVIDUAL APPLICATION PROCEDURES

E4.1. STEP 1. SELECT A SCHOOL AND PROGRAM

E4.1.1. Call or write the nearest VA regional office to obtain information about approved programs. Obtain telephone numbers by consulting your local telephone directory for the Department of Veterans Affairs under the U.S. Government section or call 1-800-827-1000. Request the current VA Pamphlet 22-90-3, "Summary of Educational Benefits Under the Montgomery GI Bill-Selected Reserve Educational Assistance Program, Chapter 1606 of Title 10 U.S. Code," reference (k).

E4.1.2. Select a college, university, or other institution.

E4.1.3. Select a program approved for the enrollment of veterans and eligible persons.

E4.2. STEP 2. OBTAIN AND COMPLETE AN APPLICATION FOR EDUCATION BENEFITS (VA FORM 22-1990) "APPLICATION FOR EDUCATION BENEFITS"

E4.2.1. Obtain an application from the financial assistance or office of admission at the school of your choice.

E4.2.2. Complete the application. Ensure that you have checked block D. in Section 11., applying for benefits under Chapter 1606 of 10 U.S.C. (reference (c)). Consult the counselor at the school, if you need assistance.

E4.3. STEP 3. SUBMIT VA FORM 22-1990

E4.3.1. To receive an entitlement determination before enrolling in school, you must submit a VA Form 22-1990 and your DD Form 2384-1 directly to the VA regional office serving the area where the school is located. Complete the VA Form 22-1990 as far in advance as possible. When enrolling in school, advise the financial assistance or office of admission that you are applying for benefits under Chapter 1606 of reference (c). The school must submit a VA Form 22-1999, "Enrollment Certification," to the VA.

E4.3.2. If you have already enrolled, provide a copy of your DD Form 2384-1 and the completed application to your school's certifying official and request that a VA Form 22-1999 be submitted for you.

E5. ENCLOSURE 5

MGIB-SR BENEFITS AND PAYMENT SCHEDULE

The VA adjusts the schedule of payment for MGIB-SR basic benefits annually based on the percentage increase in the Consumer Price Index for the 12-month period ending on the June 30 preceding the beginning of the FY for which the increase is made. Rates in sections E5.1. and E5.2., below, are expressed in percentages of the monthly full-time rate established annually by the VA. Except as indicated, for each month that a Service member is paid a monthly educational allowance under this instruction, the period of entitlement for that Service member shall be charged with the percentage of 1 month that corresponds to the percentage received by the Service member of the educational allowance otherwise payable to such Service member for that month (e.g., if the member receives 75 percent of the allowance, the member shall be charged 75 percent of a month).

E5.1. INSTITUTIONS OF HIGHER LEARNING; UNDERGRADUATE AND GRADUATE PROGRAMS

E5.1.1. Full-Time; 100 percent.

E5.1.2. Three-Fourths time; 75 percent.

E5.1.3. One-Half time; 50 percent.

E5.1.4. Less than one-half time; a reduced rate determined by the VA.

E5.2. OJT AND APPRENTICESHIP TRAINING

Failure to complete 120 hours of training in a given month shall limit educational assistance to the proportion of the applicable full-time rate as the number of hours worked during that month, rounded to the nearest 8 hours, bears to 120 hours.

E5.2.1. First 6 months; 75 percent.

E5.2.2. Next 6 months; 55 percent.

E5.2.3. Remainder of the program; 35 percent.

E5.3. CORRESPONDENCE COURSES

Paid at 55 percent of the established charge the institution requires non-veterans to pay, and payable on a quarterly basis prorated for lessons completed by the Service member. (See enclosure 2 for a definition of "established charge.")

E5.4. TUTORIAL ASSISTANCE

On approval by the VA, paid to a Service member enrolled in and pursuing a post-secondary course of education on a half-time or more basis at an educational institution, if the Service member has a deficiency in a subject required as part of the satisfactory pursuit of his or her program of education. The Secretary of the VA determines that such assistance is necessary for the Service member to complete the original program of education successfully. Tutorial assistance shall only be paid if the Service member is receiving MGIB-SR benefits. The amount may not exceed \$100 for any month or aggregate more than \$1200, and shall be in addition to the amount of educational assistance payable to the Service member. The entitlement of the Service member to educational assistance shall be charged only for the amount of tutorial assistance paid in excess of \$600. The charge shall be an amount that is equal to the monthly educational assistance allowance that the person is otherwise eligible to receive for full-time pursuit of an institutional course.

E5.5. INDEPENDENT STUDY

The educational assistance benefit is paid at the less than half-time rate for each month for courses offered through accredited institutions without any regularly scheduled classroom sessions.

E5.6. COOPERATIVE PROGRAMS

The rate for a cooperative program, (full-time programs of education, which may or may not lead to a degree) is 100 percent of the monthly rate. The programs typically consist of alternating phases of school instruction and training in business and/or industrial settings.

E5.7. OTHER VOCATIONAL AND/OR TECHNICAL COURSES

Paid at the same rate as students pursuing programs offered by institutions of higher learning.

E5.8. REMEDIAL AND/OR DEFICIENCY AND/OR REFRESHER COURSES

E5.8.1. The individual has demonstrated deficiency in the past.

E5.8.2. The individual must retake courses taken before, due to changes in highly technical fields.

E5.8.3. The rate of payment shall be set at the resident rate of the institution.

E5.8.4. The institution of higher learning shall make determination of need for course(s).

E5.9. FLIGHT TRAINING

E5.9.1. Benefits may be paid for flight training after September 30, 1990.

E5.9.2. Rate of payment is 60 percent of the established charge for tuition and fees, including charges for solo flying hours.

E5.9.3. The Service member must be pursuing a vocational or professional objective in the field of aviation.

E5.9.4. The Service member must possess a private pilot license and meet the medical requirements for the desired license before beginning training and throughout his or her flight training program.

E5.10. ALTERNATIVE TEACHING CERTIFICATION

Benefits may not be paid for courses leading to Alternative Teaching Certification pursued after September 30, 1996.

E5.11. MGIB-SR KICKER

E5.11.1. Rate of payment is at one of 3 monthly rates equaling \$100, \$200, or \$350 for Military Service in a critical skill or unit, as designated by the Secretary concerned. MGIB-SR Kicker payments shall be paid with and additionally to basic benefits paid under Chapter 1606 of 10 U.S.C. or Chapter 30 of 38 U.S.C. (references (c) or (e)) up to 36 months.

E5.11.2. The MGIB-SR Kicker should be granted for a critical unit only in cases in which the Service member does not qualify for a Service-designated critical skill and the Service member qualifies for and agrees to serve in a duty position of a Service-designated critical unit.

E6. ENCLOSURE 6

MGIB-SR KICKER OBLIGATION ADDENDUM GUIDANCE

E6.1.1. A document is required that records the offer of the MGIB-SR Kicker to a Service member and acceptance by the Service members.

E6.1.2. A written agreement shall be executed with each Service member who undertakes a Service obligation for which he or she expects to attain eligibility for the MGIB-SR Kicker payments.

E6.1.3. The written agreement indicates the specialty, skill, or unit for which the Military Service is offering MGIB-SR Kicker eligibility, the monthly payment amount, the conditions to attain and retain MGIB-SR Kicker eligibility, and the conditions under which a portion of the payment paid may be recouped.

E6.1.4. The Services shall use the agreement in attachment E6.A1. to this enclosure as a guide to develop a Service-specific agreement. Service-specific agreements shall include all of the elements in the model agreement in attachment E6.A1. to this enclosure.

Attachments - 1

E6.A1. Required Written Agreement Elements For the Montgomery GI Bill
Selected Reserve (MGIB-SR) Kicker

E6.A1. ATTACHMENT 1 TO ENCLOSURE 6

REQUIRED WRITTEN AGREEMENT ELEMENTS FOR THE MONTGOMERY GI BILL SELECTED RESERVE (MGIB-SR) KICKER

E6.A1.1. ACKNOWLEDGMENT

In connection with my enlistment, reenlistment, or extension in the _____ (name of Reserve component) to become eligible for the MGIB-SR Kicker, I acknowledge that:

E6.A1.1.1. I meet the eligibility criteria, as follows:

E6.A1.1.1.1. I am entitled (or expect to become entitled) to the MGIB-SR. Initial eligibility is acquired by a 6-year obligation to serve in the SR, a high school diploma or equivalency certificate, and completion of Initial Active Duty for Training. Continued satisfactory performance in the SR is another eligibility requirement. Entitlement may extend to 10 years from the date entitlement is first attained, and I may collect up to 36 months of benefits. A complete description of entitlement requirements and rules that permit extension of the 36 months and the 10-year entitlement period under specified conditions are in DoD Instruction 1322.17.

E6.A1.1.1.2. I agree to serve for 6 years in a specialty or skill duty position, or in a unit of the SR, that the Secretary concerned has designated to be "critical."

E6.A1.1.2. The particulars of my MGIB-SR Kicker agreement are, as follows:

E6.A1.1.2.1. The critical specialty or skill in which I shall serve is:

_____.

E6.A1.1.2.2. The critical unit in which I shall serve is:

_____.

E6.A1.1.2.3. The amount of increased educational allowance to supplement each month of basic benefit to which I am entitled is \$ _____. That monthly benefit shall be adjusted by the VA for less than full-time pursuit of qualifying educational programs.

E6.A1.1.3. The MGIB-SR Kicker may increase either the MGIB-SR or MGIB benefits under Chapter 30 of 38 U.S.C. If I am eligible for the MGIB in Chapter 30 of 38 U.S.C. benefit, I may elect, at the time I apply for benefits, which program to supplement with the MGIB-SR Kicker.

E6.A1.1.4. While suspended or if terminated from MGIB-SR basic program entitlement, I will not be eligible to receive MGIB-SR Kicker benefits.

E6.A1.1.5. I understand that if I voluntarily leave the critical position for which I was granted MGIB-SR Kicker benefits before completing the 6-year obligation, even if I remain in the SR, I shall no longer be eligible for the MGIB-SR Kicker benefit, unless I comply with paragraph E6.A1.1.6., below.

E6.A1.1.6. I may regain eligibility for the MGIB-SR Kicker benefit within 1 year of departure from the MGIB-SR Kicker qualifying position (3 years if granted an authorized period of nonavailability for a religious missionary obligation) if, as follows:

E6.A1.1.6.1. I am MGIB-SR entitled.

E6.A1.1.6.2. I return to the Reserve component that granted the MGIB-SR Kicker in the original MGIB-SR Kicker-designated duty position or to a duty position that I am qualified for that is designated for the MGIB-SR Kicker at the time of my return.

E6.A1.1.6.3. I extend my period of enlistment or obligation for a period that, in combination with time already served in a critical skill position or unit, shall equal 6 years.

E6.A1.1.7. After I complete the 6-year SR Service obligation, I shall remain eligible for the MGIB-SR Kicker regardless of the duty position or Reserve component in which I serve, as long as I remain entitled to receive MGIB-SR benefits or MGIB benefits under Chapter 30 of 38 U.S.C.

E6.A1.1.8. I cannot become eligible for a subsequent MGIB-SR Kicker at the conclusion of that 6-year period.

E6.A1.1.9. If I am declared an "Unsatisfactory Participant" by the Secretary concerned before completion of the 6-year period I have agreed to serve to obtain that benefit, a portion of benefits received are subject to recoupment additionally to any MGIB-SR basic benefits that may be subject to recoupment. The amount of recoupment for the MGIB-SR Kicker shall be computed by multiplying the total

MGIB-SR Kicker benefit received by the percent of unfulfilled Service obligation. The amount to be refunded shall accrue interest from the date I am first notified of the amount due.

E6.A1.1.10. If I am involuntarily removed from the critical specialty, skill, or unit, I may be eligible for continued MGIB-SR Kicker benefits. The conditions under which the benefit may be continued are explained in DoD Instruction 1322.17. The Secretary concerned adjudicates the merits of each case.

E6.A1.2. UNDERSTANDING

E6.A1.2.1. I have read and understand each of the statements in this agreement, and the statements in DD Form 4, "Enlistment/Reenlistment Document - Armed Forces of the United States," or other contractual documents that record my obligation for 6 years in a critical specialty, skill, or unit.

E6.A1.2.2. I understand that these statements constitute all promises or agreements whatsoever on my enlistment, extension of enlistment, or other obligation agreement.

E6.A1.3. PRIVACY ACT STATEMENT

E6.A1.3.1. AUTHORITY: 10 U.S.C., Sections 16131 through 16136; and E.O. 9397.

E6.A1.3.2. PRINCIPAL PURPOSE(S): Information will be used to establish eligibility by members of the Selected Reserve to Montgomery GI Bill Educational Assistance benefits.

E6.A1.3.3. ROUTINE USE(S): To the Department of Veterans Affairs, to substantiate eligibility for an increase in educational assistance under the Montgomery GI Bill-Selected Reserve.

E6.A1.3.4. DISCLOSURE: Voluntary; however, failure to provide personal information may preclude processing of the Written Agreement for the MGIB-SR Kicker.

E6.A1.3.5. COMPUTER MATCHING: Information provided on the Written Agreement for the MGIB-SR Kicker is subject to a computer matching agreement between the Department of Defense and the Department of Veterans Affairs.

Computer matching is employed to verify an individual's eligibility for and continued compliance with Federal benefit programs, and in some instances is used to effect adjustments or recovery of improper payments made to or delinquent debts owed by a beneficiary or former beneficiary.

E6.A1.4. AUTHENTICATION

E6.A1.4.1. Service Member Name, Grade, Signature, SSN, and Date

Print Name and Grade Signature SSN Date

E6.A1.4.2. Authorized Administering Official Name, Grade, Signature, and Date

Print Name and Grade Signature SSN Date

E6.A1.4.3. Service Representative Name, Grade, Signature, and Date

Print Name and Grade Signature SSN Date