



MISSISSIPPI NATIONAL GUARD  
JOINT FORCE HEADQUARTERS  
1410 RIVERSIDE DRIVE  
JACKSON, MISSISSIPPI 39202



Toll free: 866-403-1289 ♦ CM: 601-313-6183 ♦ DSN: 312-293-6183 ♦ CM: 601-313-6442

## FEDERAL TUITION ASSISTANCE- GoArmyEd

### DO I QUALIFY FOR FEDERAL TUITION ASSISTANCE (FTA)?

- If you are currently serving in a satisfactory status in the Army National Guard and do not ETS or MRD prior to completion of course(s).
- If you are a CW2 or 1LT or above you will be subject to a 4 year Reserve Duty Service Obligation (RDSO) or a 2 year Active Duty Service Obligation (ADSO).

### WHAT WILL FTA PAY FOR?

- Up to **\$4,500** per fiscal year which is further broken down as:
  - Up to **\$250.00** per semester hour, **166.67** per quarter hour, or **\$5.55** per clock hour.
- FTA may pay towards the cost of tuition and some fees **IF**:
  - The College/University is Regionally or Nationally accredited **AND** is an active GoArmyEd participant.
  - The fee is required for enrollment in a **SPECIFIC** course, is charged to all students, and is 100% refundable if you were to drop the class.
  - Funded courses must be part of your documented degree plan from the school
- FTA may pay towards **ONE** of each level of credential with the limitations of up to **130 undergraduate** hours and **39 graduate** hours taken in progressive order. **FTA cannot be used for courses leading to a lower, lateral, or duplicate postsecondary credential or degree that has been documented in your education record, regardless of funding source.**
  - Undergraduate level certificate/certification (must maintain a **2.00 GPA**)
  - Associate Degree (must maintain a **2.00 GPA**)
  - Bachelor Degree (must maintain a **2.00 GPA**)
  - Master Degree (must maintain a **3.00 GPA**)
  - Graduate level certificate/certification (must maintain a **3.00 GPA**)
    - \* Must **NOT** have already earned a Master's Degree to be eligible with the exceptions of **initial** state teacher certification or Chaplain Certification (**Chaplain Candidates are ineligible**).
    - \* Contact your GoArmyEd representative for further guidance.



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## WHAT WILL FTA NOT PAY FOR?

- FTA will **NOT** pay towards:
  - **First Professional degrees are NOT eligible.** This includes, but is not limited to, Doctor of: Chiropractic, Dental Science, Dental Medicine, Juris Prudence (also known as Juris Doctor), Medicine, Optometry, Osteopathic Medicine/Osteopathy, Pharmacy, Podiatric Medicine/Podiatry, and Veterinary Medicine.
  - **Any program that bundles costs (the charges for the program must be charged by the course and NOT as a lump sum for the program).**
  - Continuing Education Units.
  - Fees such as parking, graduation, health center, and enrollment.
  - Room and board, meal cards.
  - Soldiers assigned to the ING/IRR are not eligible.

## WHAT DO I DO TO GET STARTED?

- How to apply:
  - **START NOW! A little work on your part WILL pay big dividends. You must begin the process early. You can apply for tuition assistance up to 60 days prior to the start date for EACH course but no later than the last day of class registration.**
  - **Failure to apply before the suspense date will result in a denial of benefits.** The GoArmyEd program is very specific and you do not want to miss out on a benefit because you failed to meet a suspense date or follow directions.
  - **A tuition assistance application requires the upload of four documents - Statement of Understanding (SOU), Degree Plan/Student Agreements, Course/Fee Cost, and Course Schedule. In addition, information for each course must be input into the GoArmyEd system.**
  - Requesting tuition assistance, uploading documents to the eFile, and the input of course data are an individual responsibility.



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- **Let's Begin**. To expedite your Tuition Assistance process, start by **scanning and saving** the following **four** documents as **separate PDF files** to your computer. You'll need these files later when you input your course information and upload documents in GoArmyEd to your eFile.
  - **Statement of Understanding(SOU)**. Type the following link in your browser, download and save a copy of the Statement of Understanding to your computer. The current form is dated September 2012.

[https://www.goarmyed.com/docs/Annual\\_TA\\_SOU.pdf](https://www.goarmyed.com/docs/Annual_TA_SOU.pdf)

Once the SOU form is saved, print it and get the form signed. Once signed, scan the form and save it as a PDF file back on your computer.

\* For **E6 and below** requesting tuition assistance, the authorization block on the Statement of Understanding must be signed by the Soldier's commander or by an E7 or above who has signature authority from the commander. If an E7 or above signs FOR THE COMMANDER, the delegation of signature authority memo from the commander **MUST** be attached to the Statement of Understanding and uploaded to the eFile in GoArmyEd. Be sure to include the commander's name and rank.

\*For **E7 and above** requesting tuition assistance, the authorization block on Statements of Understanding may be signed by the Soldier, FOR THE COMMANDER. Be sure to include the commander's name and rank.

- **Course and Fee Cost** consisting of official school documentation with student's name, such as an itemized receipt, a current invoice, or a statement of tuition and fees specific to your enrollment. **Tuition and fees must be listed separately** with courses identified showing a breakdown of cost-per-semester/quarter/clock-hour and fees. Fees must be itemized and specific to each course (i.e. Lab Fee for BIO 1101).



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- **Class Schedule** with student's name showing all courses with the start and end dates, course department and numbers, course names, course hours and days/times for each class.
- **Servicemembers Opportunity Colleges Academic Degree (SOCAD) Plan – Student Agreement/Documented Degree Plan.** A documented degree plan must include **four** items:
  - \* Soldier's name
  - \* Listing of all of the requirements for degree completion
  - \* Evaluation of transcripts, to include military training and college credits previously earned
  - \* Endorsement by the school (hand-written or digital signature of a school official) OR degree plan generated directly from the school's online automated degree audit system.
- **Establish a GoArmyEd Tuition Assistance Account.**
  - Go to [www.GoArmyEd.com](http://www.GoArmyEd.com), SCROLL DOWN, select "New User". Complete the required training for a base role GoArmyEd account, which results in the creation of your GoArmyEd user name and password. **Don't lose your password!** Also, ensure you input your **preferred email address** and **good contact numbers.** **This is extremely important!** The email address used should be an email address you check regularly. It **does not** have to be an AKO email. **Recommend a personal email such as Yahoo, Hotmail, etc.**
  - Once your account is activated, perform the following steps:
    - \* **STEP 1: Click on Request TA Access.** Then select Save and Continue
    - \* **STEP 2:** You will arrive at the **Training Page**, Select Launch Video OR Launch Presentation. Go through the video/presentation until you are complete. Once complete, the website will direct you back to the Training Page, Select the bubble "I certify that I have completed GoArmyEd Training." Select Save and Continue.
    - \* **STEP 3: Statement of Understanding.**  
If you have not already scanned and saved a signed copy of the Statement of Understanding on your computer, click, "Annual TA SOU FORM," print and have the form signed. Once signed, scan the **three** page document and save the form as a PDF file on your computer.
      - **Upload to your eFile the Statement of Understanding (SOU) – Transaction Type – Tuition Assistance Statement of Understanding** by selecting Browse, selecting the SOU document and clicking Open. Select Save and Continue.

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\*For **E7 and above** requesting tuition assistance, the authorization block on Statements of Understanding may be signed by the Soldier, FOR THE COMMANDER. Be sure to include the commander's name and rank.

- **STEP 4: Home School and Degree Plan.** Select "Link to Search Schools" Type in Name of School and location information. Select Degree Level, and Degree Name. Select Save and Continue.
- **STEP 5: Common Application.** Go through and complete the four sections, Contact Information (**double check the preferred email address**), Demographic Information, Prior Education and Additional Information and fill out **ALL** sections in their entirety.
- **STEP 6: Submit Request.** Select Submit for Approval. \*Write down your case number, which is given to you once you click Submit for Approval\*\* **You can't proceed until you receive an email approving your account activation.**
- **STEP 7: Receive email approval.** Once email approval is received:
- **STEP 8: Login to [www.GoArmyEd.com](http://www.GoArmyEd.com).**
- \* **STEP 9: Select "My Education Record" Smart Link**
- \* **STEP 10: Select the "eFile" tab**
- \* Complete the required fields. Ensure you select the correct transaction type for **EACH** file you upload. Only one file can be uploaded at a time.
  - ❖ **Degree Plan – Transaction Type – SOCAD Student Agreement/Documented Degree Plan**
  - ❖ **Course and Fee Cost – Transaction Type – Costs and/or Course**
  - ❖ **Enrollment Verification Class Schedule – Transaction Type – Costs and/or Course Enrollment Verification**



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- \* Select "Browse" to find the following PDF files you had previously scanned and saved to your computer.
  - ❖ **SOCAD Student Agreement/Documented Degree Plan**
  - ❖ **Course and Fee Cost**
  - ❖ **Enrollment Verification Class Schedule**
- \* Select "Upload File".
- \* **Once EACH document with the CORRECT transaction type has been uploaded to your eFile, you are ready to apply for tuition assistance!**

## REQUESTING TUITION ASSISTANCE (TA)

**Soldiers MUST input ALL courses listed on their class schedules when requesting tuition assistance. Failure to do so will result in a reduced tuition assistance amount per credit hour.** For example, if a school charges a flat tuition rate for 12-18 hours (\$3,168) and a Soldier is taking 15 hours, the Soldier must input **ALL** 15 hours at a cost of \$211.20 per credit hour which equals \$3,168. If the Soldier input **only** 12 hours at a cost of \$264 per credit hour, and the schedule reflects 15 hours, the tuition amount (\$3,168) will still be divided by 15 hours and not 12, resulting in the Soldier receiving a reduced amount which would equate to \$211.20 per credit hour. In this case, the Soldier would receive \$2534.40, a difference of \$633.60. **Again, ensure tuition assistance is requested for ALL courses listed on the course schedule.**

- **STEP 1.** Login to [www.GoArmyEd.Com](http://www.GoArmyEd.Com) with your Username and Password
- **STEP 2.** Select "Request TA". Select "Yes" agreeing to the terms of the Army Tuition Assistance Statement of Understanding and agree to the conditions for the use of tuition assistance as verified by your authentication. Enter password, Press Submit.
- **STEP 3.** Confirm school is pre-populated, enter the class subject, Catalog and the Class start date and select NEXT. **Do not input a class unless it is on your degree plan, schedule, and invoice.**
- **STEP 4.** Once the TA Request Displays, Complete **each** required field in the Class Information and Class Cost Sections. Search eFile and attach your **Course Schedule AND Course and Fee Costs** here.
  - \* **Class Schedule – Transaction Type – Costs and/or Course Enrollment Verification** showing all courses with student's name with the course start and end dates, course department and numbers, course names, course hours and days/times for each class.



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- \* **Course and Fee Cost – Transaction Type – Costs and/or Course Enrollment Verification** consisting of official school documentation with student's name such as an itemized receipt, a current invoice, or a statement of tuition and fees specific to your enrollment. **Tuition and fees must be listed separately** with courses identified showing a breakdown of cost-per-semester/quarter/clock-hour and fees. Fees must be itemized and specific to each course (i.e. Lab Fee for BIO 1101).
- \* **Unit Type** will be Semester, Quarter, or Clock. **Unit** will be the number of hours for the course, i.e. 3.00. **Unit Cost** will be the **cost per hour, NOT per course**. Select "Calculate Cost" to populate the invoice section so you can see the final Army and Soldier's costs.
- **STEP 5. Verify all the information you provided in the TA Request matches the information you've uploaded into your eFile.**
- **STEP 6. Review your TA Request for accuracy and then select "Submit".**
- **STEP 7.** Confirm your email address information and your contact information.
- **STEP 8.** Click "Account Information Verified" button. <Click Ok>
- **STEP 9.** If you need to request TA for another class Click YES. If not, exit the screen.
- **STEP 10. When the TA Request is approved by the Army, you will receive a confirmation email.**

### **AFTER RECEIVING TA REQUEST APPROVAL**

- **STEP 1.** Select "**Request TA**" in the Smart Links section from your GoArmyEd homepage.
- **STEP 2.** On the next screen select the "**View All TA Requests**". It's located near the bottom of the page. The Request TA screen appears. Select the "**Search**" button.
- **STEP 3.** All TA requests will appear. Select one course from the desired term. Click on it. A new screen will appear.
- **STEP 4.** Place a check in the "**Print Select**" checkbox for the courses you want to print on your TA Form.
- **STEP 5.** Select the "**Print TA Form**" button. A report will run and a message will appear that a report has run and a link will be provided, "**Click here to view report**". Select the link and print or save the form as a .pdf to your computer. Submit the form to your school's business office.



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**Ensure the data on the TA Approval Form is correct. If you identify an error, it is your responsibility to notify the education office to see if a correction can be made.**

**If TA does not cover the entire cost of the class, you are responsible for the remainder, which will be billed directly by the school.**

## **HOW TO CHANGE CONTACT INFO/PREFERRED EMAIL ADDRESS**

- The use of email is the primary means of communication in GoArmyEd. In the near future and due to the AKO email account migration, Soldiers will be unable to access their AKO email accounts unless they have a CAC card reader or a deferment to continue to use a password. The “**preferred**” email account in GoArmyEd does not have to be an AKO email address. **Recommend a personal email such as Yahoo, Hotmail, etc.** To change contact information:
- **Log into the GoArmyEd account.** The Welcome Screen appears.
- Under Smart Links, Click on **My Education Record** tab.
- The Student Record Screen appears. On the right side of screen, under Personnel, click on **Account Information**. The Account Information Screen appears.
- **Verify the mailing address is correct.** Make necessary changes.
- **Verify Primary and Alternate Phone numbers.** Make necessary changes.
- **Verify Alternate and Preferred Email Addresses.** If the addresses are incorrect, enter another email address in the Alternate Email box. Then, click **Update Account Information**. The Account Information screen appears with a message, “Your account information was successfully updated.”
- Click back on **Return to Account Information**. Verify your changes. Under Preferred Email, click on the drop down box. Choose the email address you want as your Preferred Email. Now, click **Update Account Information**. Once you’ve done that, you are taken back to the Account Information Screen. The Account Information screen appears with a message, “Your account information was successfully updated.” Click on **Return to Account Information** once again and verify the changes. If your Preferred Email address is reflected in the Preferred Email box then the update is complete.



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## **FORGOT YOUR USERNAME OR PASSWORD?**

- Click on “Forgot your username and/or password?”
- Enter the last 5 digits of your Social Security Number and your Date of Birth, then click “Submit”
- Create your new password and click “Submit”
- A confirmation email will be sent to your preferred email account with your username and new password

## **HOW TO CHECK YOUR TA BALANCE**

- Login to [www.GoArmyEd.com](http://www.GoArmyEd.com) and look in the My Education section to see your TA balance.

## **HOW TO CHANGE HOME SCHOOL AND DEGREE PLAN**

- Soldiers who wish to change their home school and/or degree plan in GoArmyEd can create a helpdesk case or meet with an Army Education Counselor to discuss options. Only an Army Education Counselor may approve a request to change degree plans.

## **HOW TO RESOLVE A HOLD**

- Log into GoArmyEd account. The Welcome Screen appears. Scroll down. Under Tuition Assistance (TA) Status, any holds will be listed. Take appropriate actions to have holds removed. A hold is applied to enforce Army Regulation 621-5 and other tuition assistance policies and regulations. Holds are removed automatically when the issue is resolved. For more information on holds and how they are resolved, go to the My Education section of your GoArmyEd homepage.

## **RECOUPMENT**

Class costs will be recouped from a Soldier for:

- Failing a class.
- An incomplete grade not resolved within 120 days.
- A course drop for personal reasons.
- Disapproved Withdrawal Military Course Drop.
- A class that is not included in the Soldier’s degree plan.
- An email notification is sent 30 days before repayment begins, except in the case of separation from the Army. See your signed SOU for recoupment rules.



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## HOW TO DROP A CLASS

- **If possible, you want to drop the class without a financial penalty. Deadlines for dropping classes without financial penalty are specified in your school's tuition refund schedule.** Each college has its own tuition refund schedule for classes dropped after the college's drop deadline.
- Soldiers **MUST** drop **each individual** class they want dropped through GoArmyEd **AND** the school before the class end date. **Before dropping a class, notify the GoArmyEd representative in the Education Office to ensure you follow proper procedures.**
- **STEP 1.** Login to [www.GoArmyEd.com](http://www.GoArmyEd.com) and select the "Withdrawal from a Class" Smart Link
- **STEP 2.** Select a checkbox to choose the class.
- **STEP 3.** View Confirmation page and choose the appropriate withdrawal reason using the dropdown options of "Withdrawal – Military Reasons (WM)" or "Withdrawal –Personal Reasons"
  - **Personal drops** – Soldiers **MUST** repay the TA amount
  - **Military Drops** (includes emergencies)– Soldiers **MUST** have the WM approved by the Army within 60 days of the initiation of the withdrawal to prevent recoupment. Download and complete the Request for TA recoupment Waiver – Withdrawal for (WM) Military Reasons Form. Upload the signed waiver request to your eFile, along with supporting documentation, i.e. orders, from the battalion commander or first LTC/O5 in the chain of command. If not on Active Duty, the form can be signed by your unit commander.
- **STEP 4.** Select the "Finish Dropping" button.

**Soldiers who provide false information regarding Federal Tuition Assistance are subject to penalty under the Uniform Code of Military Justice (UCMJ)**



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## WHERE TO GET HELP

Contact **YOUR** Mississippi Army National Guard Education Office

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Make an appointment. Come see us. We're located at Joint Force Headquarters, Mississippi National Guard, 1410 Riverside Drive, Jackson, MS 39202.

### OTHER RESOURCES:

- Login to [www.GoArmyEd.com](http://www.GoArmyEd.com)
  - Click on the Help Desk Tab
  - Click on Help Desk Resources
- Contact the GoArmyEd Helpdesk:
  - CONUS toll-free: 1-800-817-9990
  - For the OCONUS toll-free number: Go to [www.GoArmyEd.com](http://www.GoArmyEd.com) and select the "Helpdesk" link and select Help Desk Contact Information
- Create a case from the GoArmyEd Homepage:
  - Select "Create a Helpdesk Case."
  - Provide a description of your concern.
  - An email confirmation of your request and the resolution will be sent to your preferred email account.

### ATTACHMENTS:

- Statement of Understanding dated September 2012
- Tuition Assistance (TA) Authorized Course Fees dated 22 Mar 2012
- Requirements for Documented Degree Plans and Servicemembers Opportunity Colleges Army Degrees (SOCAD) Student Agreements (SA) dated 28 Jan 2013
- Request for TA Recoupment Waiver – Withdrawal for Military Reasons Form

## GOOD LUCK IN YOUR STUDIES!

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**Statement of Understanding for Use with Army Tuition Assistance (TA)** For use of this form, see AR 621-5; the proponent agency is DCS, G-1

**DATA REQUIRED BY THE PRIVACY ACT OF 1974**

AUTHORITY	10 U.S.C. 3013, Secretary of the Army; 10 U.S.C. 2005, Advanced education assistance: active duty agreement; reimbursement requirements; 10 U.S.C. 4302, Enlisted members of Army: schools; AR 621-5, Army Continuing Education System; and E.O. 9397 (SSN).
PRINCIPAL PURPOSES	To provide a record for soldiers that agrees to the terms and conditions of the Army Tuition Assistance program. This statement becomes part of the Soldier's military education records used to document Army Education management actions.
ROUTINE USES	The DoD "Blanket Routine Uses" that appear at the beginning of the Army's compilation of systems of records apply to this system.
DISCLOSURE	Voluntary. However, failure to agree with the terms of the Army Tuition Assistance Statement of Understanding will prevent enrollment and financial assistance.

1. BASIC TUITION ASSISTANCE: I understand--
  - a. The Army will pay a specified percentage of the total tuition and fee charges IAW AR 621-5 of an educational institution if I am authorized Army Tuition Assistance (TA). The total educational TA received will not exceed the Department of Defense established fiscal year (FY) tuition ceiling and caps. I agree to pay the remaining amount of tuition and other costs and fees associated with my attendance at any educational institution.
  - b. TA is authorized on a course-by-course basis for classes that support my approved educational degree plan in GoArmyEd. No changes will be made in the courses or dollar amounts for which TA is approved without the approval of Headquarters Army Continuing Education System (HQ ACES). Any additional agreements between the educational institution and me are not binding on the Army and if TA is not authorized, I agree to pay the cost of tuition to the Army and/or school.
  - c. The use of TA is limited to 130 semester hours of undergraduate credit, or a baccalaureate degree, whichever comes first; and 39 semester hours of graduate credit or a master's/first professional degree, whichever comes first; or for those exceptions outlined in AR 621-5.
  - d. I will obtain an approved education plan from my academic institution within the stipulated timeframe or completion of 9 semester hours (SHs), whichever is less, before requesting additional TA.
2. ELIGIBILITY:
  - a. All active duty Soldiers.
  - b. All Soldiers in AGR status, pursuant to Title 10 and Title 32.
  - c. All Reserve Component personnel in an active drilling status who are coded as 'satisfactory participant.'
  - d. TA is authorized for courses leading to completion of a documented educational plan for one credential each at the certificate, associate, bachelor, and master level. I understand I am not eligible to pursue courses leading to a lower or lateral postsecondary credential (except as noted for certification or licensure and for state education credential as described in AR 621-5).
  - e. I understand I am not eligible to pursue a lower or lateral credential.
  - f. I am not attending schooling under provisions of AR 621-1 (Fully Funded Officer Education Program (excluding Training with Industry), Expanded Graduate Education Program, Degree Completion Program, Cooperative Degree Program, Advanced Degree Program and Short Courses Training), or as a Reserve Officers Training Corps (ROTC) scholarship recipient, or the Green to Gold Program.
  - g. TA will only be issued to work on one credential at a time.
  - h. I am not flagged under provisions of paragraph 1-12, or 1-13 AR 600-8-2. APFT and Weight Control flags do not make Active component and National Guard Soldiers ineligible for TA.
  - i. I have not received approval for voluntary separation under VSI or SSB programs.
  - j. I must achieve and maintain a grade point average (GPA) of 2.0 upon completion of 15 SHs (or equivalent) of undergraduate college credit courses funded by TA, or a GPA of 3.0 after the completion of 6 SH (or equivalent) of graduate college credit courses funded by TA.

- k. I understand I am not eligible for TA if I am assigned to the Individual Ready Reserve (IRR) or the Inactive National Guard (ING).
  - l. If flagged for any reason (note the APFT and Weight Control exceptions), I understand that I am not eligible for TA.
3. TIME CONDITIONS:
- a. Enlisted Soldiers must have sufficient time at current duty station to complete classroom courses and sufficient time in-service to complete all other courses.
  - b. All Soldiers must request TA through [www.goarmyed.com](http://www.goarmyed.com) prior to the start date of the course or no later than the institutions late registration period.
  - c. All Soldiers must withdraw from classes through [www.goarmyed.com](http://www.goarmyed.com). Depending on your school, you may also need to withdraw through the school's system in addition to GoArmyEd.
  - d. Officers and Commissioned Warrant Officers see section six for ADSO and RDSO information.
4. WITHDRAWAL/RECOUPMENT OF TUITION ASSISTANCE (TA):
- a. I will reimburse the Army any TA received if I withdraw from or fail to complete a course for academic or personal reasons to include; receipt of "F" for nonattendance, failure to remove an "I" for an incomplete grade within the time stipulated by the school, or 120 days, whichever comes first; receive a "D" or "F" grade in graduate courses, or required withdrawal is due to official separation, confinement, or similar administrative action by my Commander for disciplinary or fraudulent causes.
  - b. I understand I will not have to reimburse the Army if I withdraw for extenuating circumstances beyond my control such as; unanticipated military mission, to include unanticipated Federal or State missions for National Guard Soldiers who are involuntarily mobilized, emergency leave, death of a family member, or illness/hospitalization as endorsed by my Battalion Commander or first LTC in the chain of command; or by my Unit Commander if in the Reserve Component for each class. I understand that providing false information could subject me to disciplinary action or criminal charges under the Uniform Code of Military Justice (UCMJ) or other punitive actions.
  - c. I understand that if I have to repay the Army the TA received it will be withdrawn from my pay through an automated process between GoArmyEd and DFAS. I understand I will be informed 30 days in advance of a pending collection action and by signing below, I consent to the salary offset to reimburse TA. During the 30 day advance warning period I understand I have the opportunity to provide information to dispute the debt.
  - d. I will advise the education center of any intent to withdraw from a class for which I am receiving TA and will follow the established GoArmyEd withdrawal procedures.
5. DUPLICATION OF BENEFITS:
- a. When combining TA with Veterans Affairs (VA) educational benefits under MGIB Chapter 30 or Chapter 1606, in no case will combined (TA and MGIB) amount exceed the total costs of the course. The limitation applies only to active duty Soldiers (including mobilized Army Reserve and mobilized National Guard on Title 10 orders.)
  - b. Army Tuition Assistance can be used in conjunction with MGIB-SR Chapter 1606 or REAP Chapter 1607 for eligible Reserve Component Soldiers attending school at least half-time.
  - c. When using Federal financial aid (PELL Grant), the Army TA will be applied first and the Federal aid will be applied to the remaining balance of financial need as determined by the academic institution.
  - d. I understand that TA cannot be authorized for courses that will repeat courses previously taken. Courses which must be repeated, because college credits are not transferable, (e.g. course taken by a non-regionally accredited school which are not accepted by a regionally accredited school) must be funded through means other than TA.
6. ACTIVE DUTY/RESERVE DUTY SERVICE OBLIGATION (ADSO)/(RDSO): If I am an Active Duty Commissioned Officer or Commissioned Warrant Officer, I understand I incur an ADSO of two years, or if I am an officer in the Reserve Component, USAR and/or National Guard, to

including mobilized officers, I incur a RDSO of four years after completion of the last course for which TA is provided unless involuntarily separated by the Army. I understand if the Army discharges me for misconduct before I complete the ADSO/RDSO, I must reimburse the Army the amount of TA that represents the unserved portion of the ADSO/RDSO. If approved for voluntary separation by the appropriate Officer Personnel Management Directorate (OPMD) Functional Area Division, I will be required to reimburse the amount of TA representing the unserved portion of the ADSO/RDSO.

- a. The ADSO reimbursement of TA will not take place prior to OPMD Functional Area Division approval of request for voluntary separation.
  - b. For USAR and National Guard officers, the service requirement and any recoupment actions associated with the RDSO will be administered by the appropriate component's officer personnel management officer.
7. REQUESTING TUITION ASSISTANCE: I understand that I will be required to provide course and cost verification data to the Army and provide a copy of the TA Request Form to my school to complete the enrollment process for schools that do not upload their courses in GoArmyEd. Failure to request Tuition Assistance via the GoArmyEd portal in accordance with the time conditions described in Paragraph 3 above will result in the denial of TA IAW AR 621-5. It is my responsibility to process class enrollments, drops and withdrawals both with my school and in the GoArmyEd portal.
8. I AGREE TO THE ABOVE CONDITIONS FOR THE USE OF TUITION ASSISTANCE AS VERIFIED BY MY SIGNATURE BELOW.

9. \_\_\_\_\_ 10. \_\_\_\_\_  
Printed Last Name, First Name, Grade, SSN-Last 4

11. \_\_\_\_\_ 12. \_\_\_\_\_  
Signature Date

12. COMMANDER'S AUTHORIZATION/VERIFICATION is required on a yearly basis. Soldiers in the rank of E7 or above may sign for themselves and their Commander in blocks 11 and 14. However, by signing this document they agree to the terms of this TA SOU. Soldiers in the rank of E6 or below must have their Commander's signature.

This form serves to apprise the Commander of the requirements of Army Tuition Assistance as stipulated in AR 621-5 and the conditions that support successful completion of the Soldier's educational goals to include the Soldier's understanding of duty requirements which may prohibit class attendance. By signing this form Commander is agreeing that Soldier is aware of the conditions governing the use of Army Tuition Assistance and agrees to support and monitor the Soldier's educational pursuits in coordination with the local Education Center. Army incurs the financial obligation for tuition/fee payment to academic institutions when Commander verifies waiver for recoupment of fees for withdrawal/incomplete due to military reasons.

13. \_\_\_\_\_ 14. \_\_\_\_\_ 15. \_\_\_\_\_  
Commander's Name, Rank & Branch Signature Date



DEPARTMENT OF THE ARMY  
HEADQUARTERS, US ARMY HUMAN RESOURCES COMMAND  
1600 SPEARHEAD DIVISION AVENUE, DEPARTMENT TAGD, # 410  
FORT KNOX, KENTUCKY 40122-5401

MEMORANDUM FOR

MAR 22 2012

Chief, Army Continuing Education System (ACES) Division G-1, U.S. Army Installation Management Command (IMCOM), ATTN: Mr. Francesco G. Serafinelli, J&M Business Park, 11711 N Interstate Highway 35, Suite 110, San Antonio, TX 78233  
U.S. Army Reserve Command Reserve Education Center, ATTN: Ms Mary Newkirk, 4710 Knox Street, Fort Bragg, NC 28310-5010  
Army National Guard Education Oversight Branch, ATTN: Mr Thomas Slaughter, 111 South George Mason Drive, Arlington, VA 22204-1382

SUBJECT: Tuition Assistance (TA) Authorized Course Fees

1. Reference: Department of Defense Instruction (DODI) 1322.25, dated 15 March 2011 Enclosure 3, 1. b.” TA shall be applied as follows” (d) “Covered charges include those that are submitted to the Service by the educational institution for tuition, instructional fees, laboratory fees, computer fees, and other fees directly related to the specific course enrollment of that member in that educational institution, are charged to all students, and are 100 percent refundable.”.
2. Effective immediately, this memorandum on course fees will enable Army Continuing Education System (ACES) professionals to support the TA Program IAW DODI 1322.25, and will remain in effect until there is a revision of Army Regulation (AR 621-5) and/or a revision in DOD policy.
3. When tuition and fees are combined into one cost, often referred to as “bundling,” TA will not be authorized. Tuition assistance is approved on a course-by-course basis IAW AR621-5 and will not include the cost of prohibited fees, such as books and computers. Institutions must itemize the tuition and fees before TA may be authorized.
4. A listing of TA-eligible fees, additional Soldier fees (not TA-eligible), and prohibited fees (not TA-eligible and not to be listed in TA request) is at Enclosure 1. This list is not all-inclusive. For additional information on fees or for a determination of fees not listed, email your inquiry to [usarmy.knox.hrc.mbx.tagd-aces@mail.mil](mailto:usarmy.knox.hrc.mbx.tagd-aces@mail.mil).
5. The point of contact for this action is Mr. Terry Backstrom, 502-613-8592, email: [terry.f.backstrom.civ@mail.mil](mailto:terry.f.backstrom.civ@mail.mil).

  
Dr. Pamela L. Raymer  
Director, Army Continuing  
Education System

SUBJECT: Tuition Assistance Authorized Course Fees

**Authorized Fees (TA-eligible Fees):**

Course-specific fees to include Lab Fee, Technology Fee, Instructional Fee, Online/Distance Learning Fee, etc. (must be charged to all students, and are 100 percent refundable)

**Non-Authorized Fees (NOT TA-eligible, but may be listed on TA Request as Additional Soldier Fees):**

- Advising Fee
- Athletics Fee
- Campus/Facility Enhancement Fee
- Campus Expansion Fee
- Energy Fee
- Flight/Air Time/Fuel Fees
- Green/Environmental Service Fee
- International Education Fee
- Library fee
- Learning Resources
- Medical Services Fee
- Publication Fee
- Parking fees
- Recreation Fee
- Safety Fee
- Student Data Management Fee
- Student Services Fee
- Student Union/Memorial Union/University Center Fee
- Technology Services/Instructional Support Fee
- Term-based Fees
- Transportation Fee
- Insurance (Disability, Vehicle, Malpractice, Health, etc.)
- Travel Fees

**Prohibited Fees (NOT TA-eligible and will not be listed on TA Request)**

- Books/Materials (print or electronic)
- Computers/Laptops/Technologies
- Supplies (paper, pencils, etc.)
- Insurance Premiums
- Meal Plans
- Room & Board
- Personal Service Fees (Laundry, Cleaning, Tutoring, etc.)

(UNCLASSIFIED)

INFORMATION PAPER

AHRC-PDE  
28 January 2013

SUBJECT: Documented Degree Plans and Servicemembers Opportunity Colleges Army Degrees (SOCAD) Student Agreements (SA)

1. Purpose: To provide guidance to Army Continuing Education System (ACES) personnel on documented degree plans and student agreements.

2. Facts:

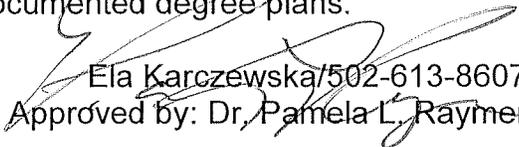
a. A documented degree plan and SOCAD SA include four items: 1) Soldier's name, 2) listing of all of the requirements for degree completion, 3) evaluation of transcripts, to include military training and college credits previously earned and 4) endorsement by the school (hand-written or digital signature of a school official OR degree plan generated directly from the school's online automated degree audit system). Note: Planning worksheets and online student degree planners only become documented degree plans when they include the above four requirements.

b. A Soldier becomes eligible for a documented degree plan or SOCAD SA after completing six (6) semester hours at the home school (AR 621-5); or within 60 days of admission and when all transcripts have been provided (applies to schools that signed DoDI 1322.25, 15 March 2011 or DoDI 1322.25, 6 December 2012, Change 1).

c. It is each Soldier's responsibility to request a documented degree plan and to provide all required documents, such as transcripts, to the home college in a timely manner. A school may decline to complete a formal evaluation if it has not received all of the required documents. Army Education Counselors may defer Student Agreement Holds in GoArmyEd after careful consideration of reasons for deferral.

d. Letter of Instruction (LOI) schools receive a weekly report indicating when student agreements are due and have established a systematic process to ensure that Soldiers receive their SOCAD SA in a timely fashion. For Soldiers in fully developed degree plans, schools submit the student agreement file electronically and approval of an Army Education Counselor is not required.

e. Documented degree plans for LOI drop-down degrees and Non-LOI schools are issued in a paper form. The Soldier is responsible for uploading the degree plan to eFile. Army Education Counselors must review and approve documented degree plans.

  
Ela Karczewska/502-613-8607  
Approved by: Dr. Pamela L. Raymer

(UNCLASSIFIED)

**Request for TA Recoupment Waiver – Withdrawal for Military (WM) Reasons**

FROM: Headquarters Army Continuing Education System (HQ ACES)

TO: Battalion Commander/First LTC/Reserve Component Commander

SUBJECT: College Course Withdrawal for Military Reasons/Waive TA Recoupment

1. Purpose: To provide documentation IAW AR 621-5 to verify non-completion of course(s) due to military reasons for which a Soldier received Army Tuition Assistance (TA).
2. A WM from college courses must be approved by the Soldier's Battalion Commander, or first LTC in the chain of command, or Unit Commander if in the Reserve Component, based on the following reasons: **Unanticipated/Unscheduled** Military Duties or Deployment, Separation from Service, Emergency Leave (includes death in the family), Illness/Hospitalization, etc.
3. IAW AR 621-5, this Soldier is requesting your review and endorsement for a TA Recoupment Waiver - Withdrawal for Military (WM) Reasons:

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Last Name	First Name	Rank	Last 4 of SSN	Signature/Date
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For the following college course(s):

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School	Course#	Course Title	Start Date	End Date	Cost

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4. Provide details of the reason for the unanticipated/unscheduled withdrawal, **to include dates** of the events below. Provide a separate sheet if additional space is needed:

5. Information concerning payment of the TA debt was sent to the Soldier. An approved request form must be posted to e-File in the Soldier's GoArmyEd record within 60 days after the withdrawal and must be approved by an Education Services Officer (ESO) to cancel the debt. Non-response or disapproval will result in recoupment of TA funds. If recoupment is initiated, Soldiers will have a 30-day due diligence notice of TA debt collection.

6. This TA Recoupment Waiver is: \_\_\_\_\_ **Approved** \_\_\_\_\_ **Disapproved** \_\_\_\_\_  
Date

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<b>Printed Name/Rank</b>	<b>Signature</b>
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<b>Unit</b>	<b>Phone</b>	<b>Email</b>
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