



Department of Veterans Affairs

The Post-9/11 Veterans Educational Assistance Act of 2008



VA Regional Processing Office
2009 CONFERENCE



Post-9/11 GI Bill

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Eligibility

Individuals with active duty service after 09/10/01 who:

- Serve a period of at least 90 aggregate days
- Serve a period of at least 30 days and receive a disability discharge

NOTE: Individuals are eligible while on active duty after serving a period of 90 days



Eligibility

- Qualifying active duty includes:
 - Full-time duty in the Armed Forces, other than active duty for training
 - A call or order to active duty under Title 10
- Active duty periods may begin at any time, however, only portion after 09/10/01 can be used to establish eligibility



Eligibility

Service which cannot be used to establish eligibility includes:

- AGR under title 32
- Service academy contract periods
- ROTC contract periods under Title 10
- Service used under the Loan Repayment Program



Eligibility

- Basic eligibility established with 90 aggregate days of service
- Benefit level based on length of service
- Maximum benefit payable if individual serves at least:
 - 36 months of active duty service
 - 30 days of active duty service with a disability discharge



Eligibility

Service Requirements (after 9/10/01 an individual must serve an aggregate of)	% of Maximum Benefit Payable
At least 36 months	100
At least 30 continuous days on active duty (Must be discharged due to service-connected disability)	100
At least 30 months, but less than 36 months	90
At least 24 months, but less than 30 months	80
At least 18 months, but less than 24 months	70
At least 12 months, but less than 18 months	60
At least 6 months, but less than 12 months	50
At least 90 days, but less than 6 months	40



Eligibility

In order to retain eligibility after meeting the service requirements, an individual must:

- Continue on active duty; or
- Be honorably discharged from Armed Forces; or
- Be honorably discharged and placed on retired list, temporary disability retired list, or transferred to Fleet Reserve or Fleet Marine Corps Reserve; or
- Be honorably discharged for further service in a reserve component; or
- Be discharged or released for
 - Injury Existing Prior to Service (EPTS)
 - Hardship (HDSR), or
 - Condition Interfered with Service (CIWD)



Period of Eligibility

- 15 years from last release from active duty of at least:
 - 90 consecutive days
 - 30 consecutive days if released for disability
- If eligibility is based on aggregate service of less than 90 consecutive days, individual will have 15 years from the last period of service used to meet the minimum service requirements for eligibility



Period of Eligibility

Example

John T. Smith is a pilot in the Air Force Reserve with the following multiple periods of call-up service:

05/15/07 – 06/13/07

03/12/08 – 05/10/08

10/30/08 – 11/28/08

He meets the minimum service requirement for eligibility effective 05/10/08, the date he completes 90 aggregate days of service

His period of eligibility expires 05/10/23, 15 years after meeting the minimum service requirement for eligibility



Elections

Individuals eligible for one of the following benefits may be required to make an irrevocable election to receive benefits under the Post-9/11 GI Bill

- Montgomery GI Bill-Active Duty (MGIB-AD or chapter 30)
- Montgomery GI Bill-Selected Reserve (MGIB-SR or chapter 1606)
- Reserve Educational Assistance Program (REAP or chapter 1607)



Elections

Individuals who establish eligibility for the Post-9/11 GI Bill must make an irrevocable election if, as of August 1, 2009, they are:

- Eligible for either MGIB-AD, MGIB-SR or REAP; or
- A member of the Armed Forces who is eligible to receive MGIB-AD benefits and who is making the basic \$1200 contribution toward MGIB-AD; or
- A member of the Armed Forces who previously declined to elect chapter 30



Elections

- An individual who relinquishes eligibility under MGIB-AD, MGIB-SR, or REAP may receive benefits for approved programs not offered by IHLs (i.e. flight, correspondence, Apprenticeship/On-the-Job Training, preparatory courses, and national tests)
- Individuals will be paid as if they are still receiving benefits under the relinquished benefit, however, their entitlement will be charged under the Post-9/11 GI Bill
- The monthly housing allowance and the books and supplies stipend are not payable



Elections

- Elections must include:
 - The effective date of the election, which must be on or after August 1, 2009
 - The benefit the individual is relinquishing to receive Post-9/11 GI Bill benefits
 - Acknowledgement that the election is irrevocable
- Individuals are encouraged to submit elections on the revised VA Form 22-1990, Application for Education Benefits
- Revised form will be available on the GI Bill website in mid-April 2009



United States

DEPARTMENT OF VETERANS AFFAIRS

Elections

VETERANS INTRANET

PART II - EDUCATION BENEFIT BEING APPLIED FOR - *See instructions for benefit eligibility criteria*

- 9A. Chapter 33 - Post-9/11 GI Bill (Complete 9F if you are eligible for chapter 30, chapter 1606, or chapter 1607)
- 9B. Chapter 30 - Montgomery GI Bill Educational Assistance Program (MGIB)
- 9C. Chapter 1606 - Montgomery GI Bill - Selected Reserve Educational Assistance Program (MGIB-SR)
- 9D. Chapter 1607 - Reserve Educational Assistance Program (REAP)
- 9E. Chapter 32 or Section 903 - Post-Vietnam Era Veterans' Educational Assistance Program (VEAP)
- 9F. Chapter 33 Election (Complete only if this is your first request for chapter 33 and you are eligible for one of the benefits listed below)

I elect to receive chapter 33 education benefits in lieu of the education benefit checked below, effective _____ (mm,dd,yyyy)

I understand that my election is irrevocable and may not be changed.

- Chapter 30 - Montgomery GI Bill Educational Assistance Program (MGIB)
- Chapter 1606 - Montgomery GI Bill - Selected Reserve Educational Assistance Program (MGIB-SR)
- Chapter 1607 - Reserve Educational Assistance Program (REAP)





Entitlement

Generally, entitlement provisions under the Post-9/11 GI Bill are similar to those under other education benefit programs:

- Individuals may receive 36 months of benefits
- If an individual's entitlement exhausts during a term, benefits may be extended until the end of the term
- Individuals eligible for more than one program administered by VA are limited to 48 months of combined benefits



Entitlement

Exception

- Individuals transferring to the Post-9/11 GI Bill from the MGIB-AD will be limited to the amount of their remaining MGIB-AD entitlement
- This provision applies when an individual:
 - Is eligible for the Post-9/11 GI Bill and MGIB-AD on August 1, 2009
 - Elects to receive Post-9/11 GI Bill benefits ***in lieu of*** MGIB-AD benefits

NOTE: This provision does not prevent an individual who is eligible for multiple benefits from receiving a maximum of 48 months of combined benefits



Entitlement

Example

Davey T. Jones used 28 months of benefits under the MGIB-SR. He establishes eligibility for the Post-9/11 Bill.

He may receive benefits for up to 48 months of VA benefits. Therefore, he is entitled to 20 months of benefits under the Post-9/11 GI Bill.

Maximum combined entitlement	48 months
Used MGIB-SR	<u>28 months</u>
Available Post-9/11 GI Bill entitlement	20 months



Entitlement

Example

James Taylor previously established eligibility for the MGIB-AD and used 10 of 36 months of benefits. He establishes eligibility for the Post-9/11 GI Bill.

The law limits him to the amount of his remaining MGIB-AD benefits. Therefore, he is entitled to 26 months of benefits under the Post-9/11 GI Bill.

Original MGIB-AD entitlement	36 months
Used MGIB-AD entitlement	<u>10 months</u>
Available Post-9/11 GI Bill entitlement	26 months



Entitlement

Example

Robert Redford established eligibility for the MGIB-AD and used 14 of 36 months of benefits. While in the Individual Ready Reserve (IRR), he was called to active duty and established eligibility for REAP.

On August 1, 2009, he is eligible for MGIB-AD and REAP. If he elects to receive benefits under the Post-9/11 GI Bill, ***in lieu of*** another benefit. His entitlement will be determined based on his election.



Entitlement

Example

If Robert elects the Post-9/11 Bill in lieu of MGIB-AD, his Post-9/11 GI Bill entitlement will be limited to his remaining MGIB-AD entitlement.

Original MGIB-AD entitlement	36 months
Used MGIB-AD entitlement	<u>14 months</u>
Available Post-9/11 GI Bill	22 months

Although his Post-9/11 GI Bill entitlement is limited to his remaining MGIB-AD entitlement, he will also remain eligible for REAP. He may use up to 12 months of benefits under REAP, thereby authorizing him a maximum of 48 months of combined benefits.

If Robert elects the Post-9/11 Bill in lieu of REAP, he is entitled to up to 34 months of Post-9/11 GI Bill entitlement.

Maximum combined benefits	48 months
Used REAP entitlement	<u>14 months</u>
Available Post-9/11 GI Bill	34 months



Benefits

- Tuition and Fees
- Monthly Housing Allowance
- Books and Supplies Stipend
- Yellow Ribbon
- Rural Benefit
- College Fund “Kickers” and Buy-up
- Licensing and Certification Tests
- Other Benefits



Tuition and Fees

- Individuals on active duty are eligible for the lesser of:
 - Tuition and fees charged; or
 - The amount of charges that exceed the amount paid by the military's federal tuition assistance
- Individuals not on active duty are eligible for the applicable percentage (based on aggregate active duty service) of the lesser of:
 - Tuition and fees charged; or
 - Highest amount of tuition and fees charged for full-time, undergraduate training at a public institution of higher learning in the state the student is enrolled



Tuition and Fees

Fees are defined as mandatory charges (other than tuition, room, and board) that are applied by the institution of higher learning for pursuit of an approved program of education and include, but are not limited to:

- Health premiums
- Freshman fees
- Graduation fees
- Lab fees

Does not include study abroad course(s) **unless** the course(s) is a mandatory requirement for completion of the approved program of education



Tuition and Fees

- Tuition and fee payments will be issued to the school on behalf of each student via Electronic Funds Transfers (EFT)
- If EFT information is unavailable, payments will be sent to the school mailing address on file in Web-Enabled Approval Management System (WEAMS)
- Payments will include student identification information and the semester, quarter or term the payment is covering



Monthly Housing Allowance

- Equivalent to the Basic Allowance for Housing (BAH) for an E-5 with dependents
- Amount determined by zip code of the IHL where the student is enrolled

<http://perdiem.hqda.pentagon.mil/perdiem/bah.html>

- Prorated based on individual's benefit level (40% to 100%)
- Payments issued directly to the student on a monthly basis



Monthly Housing Allowance

Individuals **are not** eligible for the monthly housing allowance if they are:

- On active duty
- Training at ½ time or less
- Pursuing training solely by distance learning



Books and Supplies Stipend

Up to \$1,000 per academic year calculated as follows:

- \$41.67 per credit hour for up to 24 credit hours
- Prorated based on the percentage of the maximum benefit payable
- Payments issued directly to the student in a lump sum for each quarter, semester or term
- Active duty members are not eligible



Yellow Ribbon

- Institutions within the U.S. may voluntarily enter into an agreement with VA to fund tuition and fee costs that exceed the highest public in-state undergraduate tuition and fees
- Provides additional funding for:
 - Training at private institutions
 - Graduate training
 - Out-of-state tuition
- Only individuals entitled to the 100% benefit rate may receive this funding



Yellow Ribbon

Participating institutions will agree to:

- Provide contributions to eligible individuals on a first-come, first-served basis
- State the maximum number of individuals for whom contributions will be made per academic year
- State the maximum dollar amount of contributions that may be provided per individual per academic year
- Provide contributions on behalf of eligible individuals using funds under the unrestricted control of the institution



Yellow Ribbon

- VA will match each additional dollar that an institution contributes, up to 50% of the difference between the student's tuition benefit and the total cost of tuition and fees
- The combined amounts may not exceed the full cost of the school's established charges
- Yellow Ribbon payments will be issued to the school on behalf of each student via EFT
- Payments will include student identification information and the semester, quarter or term the payment is covering



Yellow Ribbon

Implementation Timeline

December 2008 – Sent Yellow Ribbon Program informational letter to IHLs

January 2009 – Sent Yellow Ribbon Program interest letter and survey to IHLs

March 2009 – Received more than 1,000 surveys from interested IHLs

April 2009 – Begin soliciting for Yellow Ribbon Agreements

July 2009 – Post Yellow Ribbon participating institutions on GI Bill website



Rural Benefit

- One-time payment of \$500 for individuals who reside in a county with six persons or fewer per square mile
 - Physically relocates at least 500 miles, or
 - Travels by air to attend school if no other transportation exist
- Payments issued directly to the student in a lump sum



College Fund “Kickers” and Buy-up

MGIB-AD and MGIB-SR kickers

- Individuals eligible for a kicker under another benefit may receive the kicker under the Post-9/11 GI Bill
- Monthly kicker amount will be prorated based on the individual’s rate of pursuit
- Payment issued in a lump sum directly to the student



College Fund “Kickers” and Buy-up

- Post-9/11 GI Bill kickers
 - Only payable if individual is entitled to a monthly housing allowance
 - Payment will be issued directly to the student with the monthly housing allowance
- \$600 Buy-up is not payable under the Post-9/11 GI Bill



Licensing and Certification Tests

- Eligible individuals may be reimbursed for **one** licensing or certification test
- Test must be approved for VA benefits
- Test must be taken on or after August 1, 2009
- Reimbursement may not exceed \$2,000



Other Benefits and Payments

- Interval Payments
 - Payment of the monthly housing allowance may be authorized during intervals
- Work-study
 - Individuals training at a rate of pursuit of at least 75% may receive work-study
- Tutorial Assistance
 - Individual's training at a rate of pursuit of at least 50% may receive tutorial assistance
 - Amount payable cannot exceed \$100 per month
 - Total amount payable cannot exceed \$1,200



Other Benefits and Payments

Chapter 30 Contribution Refunds

- Individuals who relinquish MGIB-AD benefits to receive Post-9/11 GI Bill benefits are entitled to a proportional amount of the basic \$1200 contribution if they exhaust their entitlement under the Post-9/11 GI Bill
- Payment will be included with the last monthly housing allowance payment when Post-9/11 GI Bill entitlement exhausts
- A refund of the \$600 additional contribution is not authorized



Transfer of Entitlement

- An individual eligible for the Post-9/11 GI Bill based on his/her own active duty service may transfer up to 36 months of entitlement to a dependent(s)
- The Department of Defense (DoD) and the Department of Homeland Security (DHS) may authorize transfer of benefits and restrict the number of months transferred
- Individuals in PHS/NOAA are not eligible to transfer benefits



Transfer of Entitlement

- To be eligible to transfer entitlement an individual must:
 - Be in the Armed Forces on August 1, 2009
 - Have completed 6 years in the Armed Forces
 - Agree to serve 4 more years in the Armed Forces
- DoD/DHS may prescribe rules for individuals who, by military rules or retirement, cannot agree to serve 4 more years after August 1, 2009
- A transferor may revoke or modify the number of months of transferred benefits
- Benefits may not be transferred to a new dependent once the transferor is no longer a member of Armed Forces



Transfer of Entitlement

Spouses may—

- Use benefits after transferor completes 6 years in Armed Forces
- Continue to use benefits if divorced unless the transferor revokes transfer
- Use benefits up to transferor's 15-year eligibility period expires unless the transferor specifies an earlier ending date
- Receive benefits in the same manner and at the same rate as the transferor



Transfer of Entitlement

Children may—

- Establish eligibility if benefits are transferred before the age of 23
- Use benefits after transferor completes 10 years in Armed Forces if they:
 - Are at least 18 years old; or
 - Have completed requirements of secondary school
- Receive benefits at the rate of a veteran



Next Steps

- VA plans to begin accepting applications for Certificates of Eligibility beginning May 1, 2009
 - Veterans and servicemembers enrolling in Fall 2009
 - VA will announce when applications for TOE will be accepted
- Certificates of Eligibility
 - Benefit level based on length of service, including Yellow Ribbon for individuals at the maximum benefit level
 - 15-year eligibility date for individuals not on active duty
 - Number of months of entitlement
 - Program approval, if applicable



Next Steps

- VA plans to begin accepting Fall 2009 enrollment certifications beginning July 6, 2009
 - Advance payment will not be available
 - Enrollment processing will begin in July 2009, however, payments **cannot** be released before August 1, 2009
- VA will begin issuing payment transactions to the Department of Treasury on August 1, 2009 for:
 - Tuition and fees
 - Yellow Ribbon, if applicable
 - Books and supplies stipend
 - College fund “kickers”
- Payments for the monthly housing allowance will be issued beginning September 1, 2009



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Questions

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