



DEPARTMENTS OF THE ARMY AND THE AIR FORCE  
NATIONAL GUARD BUREAU  
111 SOUTH GEORGE MASON DRIVE  
ARLINGTON, VA 22204

NGB-ARM-EI

12 May 2008

MEMORANDUM FOR SEE DISTRIBUTION

SUBJECT: Army National Guard (ARNG) Federal Tuition Assistance (FTA) (NGB-ARM Policy #08-04)

**1. References.**

- a. Title 10, United States Code (USC), Section 2007, Payment of Tuition for Off-Duty Training or Education, 19 January 2004.
- b. Department of Defense Directive 1322.8E, Voluntary Education Programs for Military Personnel, 03 January 2005.
- c. Department of Defense Instruction 1322.25, Voluntary Education Programs for Military Personnel, 05 February 1997.
- d. Army Regulation (AR) 621-5, Army Continuing Education System, 11 July 2006.
- e. Army Regulation (AR) 600-8-2, Suspension of Favorable Personnel Actions (FLAGS), 23 December 2004.
- f. Memorandum, Under Secretary of Defense, 12 December 2006, subject: Uniform Tuition Assistance Policy: Foreign Language Proficiency.

**2. Purpose.** This memorandum establishes policy to administer the ARNG FTA program. The intent of this program is to provide up-front assistance to Soldiers pursuing their education goals.

**3. Implementation.** This policy supersedes NGB-ARM Policy, 15 May 2007, subject: Army National Guard (ARNG) Federal Tuition Assistance (FTA). Policy will be implemented 1 May 2008 and remain in effect until rescinded or superseded.

**4. Eligibility**

- a. Must be an ARNG Soldier in active drilling status. Enlisted Soldiers must remain in an active drilling status through the end date of the course. Commissioned officers must agree to a 2-year Active Duty Service Obligation (ADSO) or a 4-year Reserve Duty Service Obligation (RDSO).

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b. Soldiers serving on Full Time National Guard Duty Operational Support (FTNGDOS) or Active Duty Special Work (ADSW).

c. Must have no active adverse flagging actions per AR 600-8-2 paragraph 1-12 through 1-15.

d. Must have less than nine Absent without leave (AWOL/UNSATs) within 12 months prior to submission of the FTA application.

e. ARNG Reserve Officer Training Corps (ROTC) scholarship recipients who elect the Room and Board scholarship option.

f. Mobilized Soldiers or Active Guard Reserve (AGR) Soldiers who do not meet the Army Continuing Education System (ACES) Service Commitment requirements for ACES TA may be eligible to receive ARNG FTA.

g. If a Soldier is not eligible IAW above criteria the State Education Services Officer (ESO) may request an exception to policy from NGB-ARM-EI (see EIOM 08-07 and 08-08). \* FTA for mobilized officers will be processed by the Soldiers' ARNG State Education Office. No exception to policy is required for this action.

h. Authorized Accreditation. Regional or national institutions applying for accreditation recognized by the US Department of Education (DOE) are eligible for FTA. Secondary schools accredited by respective state boards of education are also eligible for FTA funding. NGB-ARM-EI reserves the right to refuse participation of schools/institutions with practices that are contrary to the intent and objectives of FTA program. A current listing of accredited schools can be found in iMARC and the US DOE website at:  
<http://www.ed.gov/admins/finaid/accred/index.html> or <http://ope.ed.gov/accreditation/>.

i. Cage Codes. High schools and colleges must have Commercial and Government Entity (CAGE) Codes to receive FTA payment IAW Federal Acquisition Regulation (FAR) subpart 4.11. Cage codes are five position codes that identify contractors that are doing business with the Federal government. The cage code supports a variety of systems throughout the government and provides a standardized method of identifying a given facility at a specific location. College representatives may visit <http://www.ccr.gov> to obtain cage codes. Requests to have schools added to the Information Management Administration and Reporting Center (iMARC) database for FTA funding are to be submitted on the "school info sheet."

## **5. Administration.**

a. Memorandum of Understanding (MOU). Institutions conducting undergraduate programs on-post must be a member of the Service Opportunity College (SOC) system. SOC-Guard will provide assistance in establishing MOUs.

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b. **Statement of Understanding (SOU).** Prior to any commitment of funds, the FTA managers will ensure that Soldiers understand their responsibilities regarding FTA as well as the restrictions regarding the duplication of federal funding. The SOU also facilitates the ADSO and RDSO of commissioned officers and commissioned warrant officers (CW2 – CW5) who incur an additional 4-year service obligation commencing at the course completion date. If the Soldier fails to meet the ADSO/RDSO after receiving FTA, recoupment will begin on a prorated basis. The member must indicate concurrence with the SOU to proceed with the application process, in the virtual armory online process. This concurrence will be the official acceptance and act as the Soldier's signature of the SOU and will be date/time stamped in the application process based upon that applicant's login.

c. **Degree Plans.** Soldiers must submit a degree plan for record, to outline their goals prior to the completion of nine semester hours (SH) of course work. Soldiers needing assistance with declaring an educational goal or degree plan should contact the ARNG Education Support Center (ESC) at 1-866-628-5999 or [esc@ngpec.org](mailto:esc@ngpec.org).

d. **DA Form 7597-R Officer Service Agreement.** iMARC creates a DA Form 7597-R in which the Soldier must indicate concurrence with the additional military service obligation. The online application facilitates this commitment based upon an applicant's login.

e. **FTA application.** The ARNG version of DA Form 2171 generated for automated online application is the only form authorized for the administration of the ARNG FTA program. Each application must include a control number which is generated in the iMARC system.

f. **DA Form 669.** To ensure accurate record keeping, each ESO will maintain a 669 file for each Soldier that applies for and receives FTA. The DA Form 669 is also available within the counseling tab of iMARC for counseling, testing, and degree planning purposes.

g. **Exception to Policy (ETP).** Requests for exceptions to the FTA policy are to be forwarded by the requesting Soldier's State ESO to NGB-ARM-EI. Send requests to Mrs. Kelly Zimmermann at: (703) 601-7690 or [kelly.zimmermann@us.army.mil](mailto:kelly.zimmermann@us.army.mil). Exception requests should contain the ETP memorandum along with a statement from the requesting Soldier. The statement should detail the circumstances associated with the request and a corroborating statement from the Soldier's supervisor/commander.

h. **Course completion/grade reporting.** Soldiers must provide grade reports within 60 days of course completion except for any courses that have a start date 30 September 2005 or before. Grade or completion notification is entered into iMARC. The FTA application authorizes ARNG education staff to receive grades from the school on behalf of the Soldier. However, this does not relieve the Soldier of the primary responsibility of submitting grades. Soldiers will receive a reminder to submit grades at 30 days and 45 days past course end date through their

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Army Knowledge On-line email account. Grades not received by 60 days past course end date will prohibit the Soldier from applying for further FTA.

i. Recoupment. ESO's must work with their United States Property & Fiscal Officer (USP&FO) to process recoupment of funds. FTA managers are responsible for verifying applicants' course completion status by receipt of a valid grade report or college transcript and processing recoupments of FTA funds as follows:

- (1) Course withdrawals due to commander's disciplinary actions.
- (2) Course withdrawal or incomplete for personal reasons.
- (3) Failing grades for academic reasons or nonattendance.
- (4) Incomplete grades that are not corrected within the time limits stipulated by the institution.
- (5) Commissioned officers who fail to complete the required 2 year ADSO or 4-year RDSO will reimburse the amount of FTA paid according to the following formula: amount of tuition assistance divided by number of months of obligation (24 or 48), multiplied by the remaining amount of obligation (IAW U.S. code Title 10 chapter 101 section 2007). For example, an officer receives \$563 in ARNG FTA but departs 24 months before completion of the four-year obligation.  $\$563/48 = 11.73 \times 24 = \$282$  to be recouped.
- (6) Enlisted Soldiers must have sufficient time in their term of service to complete the course. Enlisted Soldiers who are discharged before the course end date will reimburse the full amount of FTA awarded for the course.
- (7) ESO's will distribute letters of notice outlining TA recoupment requirements to Soldiers and commanders with suspense dates that will document the action taken.

**6. Authorized Rates.** The total amount of FTA (including all qualifying fees) each Soldier can receive will not **EXCEED** \$4,500 per fiscal year (FY). The following authorized rates for ARNG FTA apply:

a. 100% of the tuition cost and authorized fees with limitations of \$250 per SH or \$167 per Quarter Hours(QH) or \$16.66 per Clock Hours (CH). To convert CHs to SHs refer to iMARC which calculates fees automatically.

Authorized fees must meet all three of these criteria in order to receive tuition assistance funding.

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(1) Fee charged by the institution as a condition of enrollment in a specific course/term or fees that all students must pay.

(2) Fee must be refundable, i.e. if the Soldier drops the class before it starts, ARNG must not be billed for any portion of the fee.

(3) Fee must be linked to enrollment in a specific course or a specific enrollment period. One-time or occasional fees are not eligible for FTA funding.

\*Examples are: Activity fees, lab fees, culinary fees, parking fees (when charged to all parking and non-parking students), etc.

b. 100% of the tuition costs associated with obtaining a high school diploma or its equivalent. This does not include the costs books and related fees. Note: A high school must be approved by their State Board of Education.

## **7. Authorized Uses**

a. No more than one credential from each of the following levels:

(1) High School Diploma or its equivalency (tuition only)

(2) Certificate & licensure

(3) Associate

(4) Baccalaureate (undergraduate)

(5) Master's or first professional

b. Soldiers who have not received a Master's degree using FTA are eligible to use FTA for a Master's degree or first professional degree. Examples of a first professional degree or Master's are Jurist Doctorate degree (1<sup>st</sup> law credential), Master of Architecture, Master's of Business Administration, Master's of Social Work, and so forth.

c. Courses leading to State education credentials (teaching, administration, supervision, and support services) to teach in the nation's public school system regardless of the degree level the Soldier has attained.

d. Undergraduate or graduate prerequisite courses for enrolling in a Bachelor's or Master's degree or for completing requirements for career advancement programs, such as United States

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Military Academy (USMA), the Army Medical Department (AMEDD) Enlisted Commissioning Program, and the Physician's Assistant (PA) program.

e. Courses offered by institutions that are accredited by regional or national accrediting agencies recognized by the Department of Education.

f. Accredited institutions contracted with learning networks or courseware vendors must include the following.

(1) Courses are part of a program appearing in the academic institution's catalog.

(2) Courses and grades reflected on the transcript are those of the academic institution's curriculum.

(3) Course yielding college credit only, not Continuing Education Units (CEUs) or equivalent.

g. Foreign language courses identified by the Under Secretary of Defense per reference 1f listed above.

h. Credit by examination (CBE) or institutional challenge examinations, if the examination is to be used as a required part of the Soldier's degree plan, does not duplicate a free DANTES exam, and is accessible to the Soldier. Note: FTA recoupment is not required when a Soldier fails an initial CBE test. However, FTA is not authorized for CBE retests or a comparable course to a previously failed CBE test.

#### **8. Limitations - TA will not be authorized for the following:**

a. A degree at a lower level or lateral degrees. The only exceptions are obtaining a certification, licensing or if the prior degree/credential was obtained without FTA funding. For example, a Soldier with a Masters degree cannot use FTA to obtain a Bachelors degree or obtain a degree equivalent to a degree they already received in which FTA funds were utilized.

b. Courses yielding CEUs or equivalent that cannot be used toward degree/certification completion. CEUs are not related to academic credit.

c. Funding of FTA for Soldiers who have nine or more SH's of FTA funded credit with one institution without a documented degree plan on file.

d. Funding of FTA for Soldiers without a cumulative Grade Point Average of 2.0 or higher after completing 15 SHs (or 22 1/2 QH or 240 CH) of FTA funded college credit.

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e. Fees levied by institutions not required for enrollment or not charged to all students in a given course or enrollment period. May include, graduation fees, matriculation fees, nonrefundable fees, credit evaluation fees, transcript fees, textbooks purchases, medical services (unless charged as a condition of registration), and any other fees that are not charged to every Soldier attending the respective institution.

f. A course that was previously funded by FTA (unless Soldier reimbursed the costs of the course or withdrew from the course for mission related reasons).

g. Military Occupational Specialty or mission required training courses. Funding for these courses need to go through the training branch/section.

h. Preparatory courses for college/graduate admissions testing, i.e. Scholastic Assessment Test (SAT), Graduate Record Exam (GRE) Law school Aptitude Test (LSAT).

i. ARNG ROTC scholarship recipients who elect the Tuition and Fees scholarship option.

j. Course at the Doctorate level.

k. CH 31, The Vocational Rehabilitation Program can not be combined with FTA.

**9. Duplication of Benefits.** Traditional drilling Soldiers may use FTA in addition to other funding sources based on certain limitations. States are highly encouraged to maximize the education benefits of Soldiers. State tuition assistance and FTA may be used concurrently but in no case are FTA funds allowed to be used in conjunction with state education benefits (either state tuition assistance or an education reimbursement programs) to achieve more than 100% of actual costs.

a. In cases where the Soldier is eligible for the DOE Pell grant, FTA may be used concurrently and will be applied first.

b. The ARNG's Student Loan Repayment Program (SLRP) is an education incentive that has no impact on receiving funds from the FTA program.

c. ARNG GI Bill Kicker can be combined with either the CH 1606 Montgomery GI Bill-Selected Reserve or CH 1607 Reserve Education Assistance Program (REAP) and FTA, providing the service member is attending school at least half-time.

d. The CH 30 Montgomery G.I. Bill-Active Duty can be combined with the ARNG GI Bill Kicker and FTA, providing the service member is attending school half-time or more.

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e. ARNG scholarship recipients who elect room and board payments in lieu of tuition and fees are eligible to receive FTA concurrently, if otherwise eligible.

**10. Application Process.** Use of the iMARC system to administer, manage and report FTA information is mandatory. All applications whether distance learning or classroom must be submitted through the automated online ARNG FTA procedures.

a. FTA application submittal. The FTA manager must either approve or deny the application based upon; the status of the applicant, school accreditation, the applicant's goals/previous course completion history, and upon funding availability. The approval of a FTA application is an obligation of FTA funds.

(1) Applications for ARNG FTA must be submitted NLT 30 days after the start date of the course. No applications will be accepted beyond 30 days after start date of a course unless the circumstances were beyond the Soldier's control (i.e. deployment) and an exception to policy is granted by NGB-ARM-EI. State ESO has the authority to restrict the application deadlines to meet state specific demands.

(2) Soldiers must register for classes with an accredited school and then apply for FTA via the [www.nationalguardbenefits.com](http://www.nationalguardbenefits.com) online application process.

(3) At no time will a Soldier take an unapproved FTA application as a guarantee of payment for courses to a school. The application must be **approved** by the ESO or FTA manager and then the approved application can be submitted to the school.

(4) The online FTA application will suffice as an "electronic signature" for SOU or ADSO/RDSO agreement. The FTA manager will verify the Soldier's eligibility.

(5) It is the Soldier's responsibility to notify the State Education Office of transfers to another State/Territory. Whichever State approve active FTA requests must continue to process them to completion. If the FTA application is not yet approved, the losing State should immediately transfer the application in iMARC to the gaining State for processing.

(6) Applicants are responsible to report any changes in courses such as adds/drops or withdrawals, no later than the last day of late registration "drop add date."

(7) ARNG FTA managers are to monitor the Federal TA link in iMARC for incoming FTA applications and execute timely processing.

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11. Point of Contact for this policy is 1LT Mitchell L. Lango at (703) 607-9759 or mitchell.lango@us.army.mil.

3 Encls

1. Annex A – Funding
2. Annex B – Approved FTA liquidation goals
3. Annex C – Funding priorities



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## **Annex A Funding**

ARNG FTA program is funded by the Army Tuition Assistance Management Decision Package (MDEP). Each State/Territory will receive an initial amount of ATA funds sent directly from National Guard Bureau (NGB) to each State/Territory USP&FO at the beginning of the fiscal year (FY). OMNG Budget Activity 1, SAG 121, and AMSCO: 121G18.A0 encompasses FTA. The Element of Resource is 252C.

a. FTA funds disbursement. The State ARNG FTA Manager or the Defense Finance and Accounting Service (DFAS), through respective USP&FO, makes a payment directly to the college/institution for the dollar amount awarded via a government credit card for prompt processing. FTA Managers will establish an 'up front' payment system with the financial aid personnel at their colleges/universities in order to prevent Soldiers from having to pay tuition costs on their own in order to remain in the course. Reimbursements can also occur with the prior approval from NGB-ARM-EI. In cases of direct reimbursement, ESO's and FTA managers will annotate the circumstances and approval of ETP by NGB in the comments section of the application in iMARC. Course start date will determine which FY the funds should be obligated against. For example, a course start date of 15 September 2007 will obligate FY07 funds. A course start date of 15 October 07 will obligate FY08 funds.

b. Accountability. Each ESO/FTA Manager is responsible to their respective USP&FO to ensure the appropriate procedures are followed in order to properly administer these appropriated federal funds, i.e. development of an obligation plan, committing, obligating, and de-obligating funds in the Automated Fund Control Order System (AFCOS), etc.

c. Additional ATA funds. NGB will monitor FTA use/need in iMARC. If additional funds become available they will be sent, as requests are validated, to the appropriate USP&FO. Each ESO/FTA Manager should keep NGB-ARM-EI informed of the need for additional FTA funds. This includes:

(1) Making accurate and timely iMARC entries.

(2) Making accurate and timely AFCOS entries. AFCOS entries include keeping the ATA Obligation Plan updated.

(3) Sending an email request for additional funds to Mr. Erich Hohensee, NGB Budget Analyst at [erich.hohensee@us.army.mil](mailto:erich.hohensee@us.army.mil) and 1LT Mitchell L. Lango, FTA Program Manager at [mitchell.lango@us.army.mil](mailto:mitchell.lango@us.army.mil).

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d. Requesting additional funds during the 4<sup>th</sup> quarter of the FY. Every year, the ARNG Comptroller Division formulates and sends out end of year guidance regarding the request of more funds or the return of excess funds. After the last regularly scheduled ARNG FAD (historically the beginning of August) all requests for additional FTA funds must be submitted via your USP&FO to NGB-ARC with a copy to NGB-ARM-EI (Mr. Hohensee). This will facilitate iMARC Annual Funding Plan (AFP) updates.

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**Annex B**

**Approved FTA liquidation goals**

Schools must receive payment for approved FTA requests in a timely manner. The percentage listed below reflects the target goals for liquidation (disbursement or de-obligation) of approved FTA requests.

<u>Period after course start date</u>	<u>% Liquidation GOAL</u>
1 month	10%
2 months	25%
3 months	85%
4 months	95%
5 months	98%
6 months or more	100%

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### **Annex C**

#### **ARNG Funding Priorities**

To ensure the best use of FTA funds, State ESO's are authorized to change prioritizations to maximize their state specific goals. The following will constitute the order of funding of ARNG FTA when funding is limited. Funding of TA will be consistent with established Soldier educational goals and in accordance with the following priorities:

- (a) Officers without a bachelor's degree.
- (b) Enlisted without a high school diploma.
- (c) Warrant officers without an Associate degree.
- (d) Enlisted without an Associate degree.
- (e) Officers without a Graduate degree.
- (f) Soldiers obtaining teacher certification.
- (g) Warrant officers without a Bachelor's degree.
- (h) Enlisted without a Bachelor's degree
- (i) DANTES and other academic tests.