

DEPARTMENT OF MILITARY AFFAIRS
MINNESOTA NATIONAL GUARD
20 WEST 12TH STREET
St. Paul, MN 55155-2098

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MN National Guard Circular 621-5-1

1 July 2004

Expires 30 June 2005
Military Personnel

MINNESOTA STATE INCENTIVES PROGRAM

Summary: This circular supersedes previous Minnesota National Guard Circular 621-5-1, dated 1 July 2003 with all changes. It provides information and describes procedures for administering the Minnesota State Incentives Programs.

Applicability: This circular is applicable to all Minnesota Army & Air National Guard Units/Organizations.

Proponent and Exception Authority: The proponent of this circular is the Joint Force Headquarters – J1 (Personnel). The proponent has the authority to approve exceptions to this circular that are consistent with controlling laws and regulations.

Interim Changes. Interim changes to this circular are not official unless authenticated by the JFHQ-J1. It will become obsolete on the expiration date shown above, unless sooner superseded or rescinded.

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CHAPTER 1**OVERVIEW**

1-1. **GENERAL.** The Minnesota Legislature enacted legislation that provides for Tuition Reimbursement for all members and the Leadership, Excellence and Dedicated Service (LEADS) Scholarship for enlisted members of the Minnesota National Guard. This circular describes criteria and procedures for administering the Minnesota State Incentives Programs. This circular is effective from 1 July 2004 through 30 June 2005 – unless sooner rescinded or modified.

1-2. **PURPOSE.** The purposes of the Minnesota State Incentives Program are to improve and maintain readiness and end strength of the Minnesota National Guard through the use of Minnesota State Incentives.

1-3. **APPLICABILITY.** This circular is applicable to all Minnesota Army & Air National Guard units/organizations.

1-4. **OBJECTIVE.** The objective of this circular is to furnish all units and organizations with guidance and information to effectively manage the Minnesota State Incentives Programs.

1-5. RESPONSIBILITIES.

a. The Adjutant General. The Adjutant General is responsible for overall policies, guidance, administration, implementation and proper utilization of the Minnesota State Incentives Program.

b. The Joint Force Headquarters – J1. The JFHQ-J1 is charged with the administration of the program for the Adjutant General and is the official designee of the Adjutant General for such purposes.

c. Recruiting and Retention Manager (RRM). The RRM is responsible for initiating and maintaining an active publicity program designed to promote recruiting and retention through the incentives offered by the Minnesota State Incentives Programs.

d. State Incentives Committee.

(1) Responsible for formulating policy contained within this circular.

(2) Composition.

- (a) JFHQ - J1
- (b) Division Chief, Army Personnel
- (c) Division Chief, Air Personnel
- (d) Recruiting and Retention Manager
- (e) State Command Sergeant Major
- (f) State Resource Management Representative
- (g) 34th Infantry Division Representative
- (h) Troop Command Representative
- (i) 133rd Tactical Airlift Wing Representative
- (j) 148th Fighter Wing Representative
- (k) Air Recruiting and Retention Superintendent
- (l) Education Services Officer
- (m) State Incentives Program Administrator, Recorder

e. National Guard Commanders. Commanders at all levels are responsible for keeping members of their command informed of the State Incentive Programs, insuring submission and verification of applications and continuing to monitor the qualification of applicants who are enrolled in the program.

f. National Guard Members will apply for benefits by following the provisions of this regulation.

1-6. **FUNDING.** The funding available for the State Tuition Reimbursement Program, the LEADS scholarship and the Commissioning Bonus may be limited by the appropriations from the State Legislature. These programs will continue providing funds are available.

1-7. **RECOUPMENT.**

a. Funds paid under State Incentives Programs may be recouped from those individuals who fail to serve satisfactorily in the Minnesota National Guard, as defined by the Adjutant General. (See Minnesota Statute section 192.501, subdivision 2 (e)).

b. If a member fails to complete a term of enlistment during which a state incentive was paid, a prorated amount of the incentive may be recouped.

c. Soldiers and Airmen will not be subject to recoupment if they fail to complete the terms of their contract due to the following conditions:

(1) Unit inactivation, relocation or reduction in force.

(2) Interstate transfer to another National Guard unit.

(3) Accepting an appointment as an officer or warrant officer in the Minnesota National Guard.

d. Written exceptions to the recoupment policy must be submitted through the soldier's chain of command to JFMN-J1R-D. The soldier must clearly explain the circumstances that may merit an exception.

CHAPTER 2**MINNESOTA STATE TUITION AND TEXTBOOK REIMBURSEMENT PROGRAM****2-1. GENERAL.**

a. The State of Minnesota sponsors the State Tuition and Textbook Reimbursement Program. The State Legislature appropriates the funding for the program biennially. If in the future, the legislature does not fund the program, neither the State of Minnesota nor the Minnesota National Guard is obligated to continue such a program.

b. Members of the Minnesota National Guard may use the State Tuition and Textbook Reimbursement Program in conjunction with the following federally funded programs:

(1) The Montgomery GI Bill

(2) Federal Tuition Assistance/DANTES Distance Learning Tuition Assistance. Note: The combination of federal tuition assistance and state tuition reimbursement cannot exceed 100% of the cost of tuition and books.

c. Tuition reimbursement is paid upon successful completion of coursework.

d. Tuition reimbursement shall not be considered by the Minnesota Higher Education Coordinating Board or by any other state board, commission, or entity in determining a person's eligibility for a state scholarship or grant-in-aid under Minnesota Statute section 136A.09 through 136A.132.

e. Tuition reimbursement received under Minnesota Statutes 1992, section 192.501, may be used to determine "need" for federally funded scholarships, loans or grants.

2-2. PURPOSE.

a. Encourage the recruitment of qualified prior and non-prior service members for the Minnesota National Guard.

b. Encourage members currently assigned to the Inactive National Guard (ING) or Individual Ready Reserve (IRR) to reaffiliate with the Minnesota National Guard.

c. Encourage current Minnesota National Guard members to extend their enlistment.

d. Encourage the recruitment of women and minorities into the Minnesota National Guard.

e. Improve the quality of Minnesota National Guard members through higher education.

f. Reward eligible Minnesota National Guard members for their willingness to serve the needs of the State of Minnesota at the order of the Governor.

2-3. ELIGIBILITY CRITERIA. To be eligible for payment of tuition reimbursement, members must meet the following criteria:

a. Membership/Rank Requirements

(1) Be a member of the Minnesota National Guard, grades from E-1 through O-5 (to include Warrant Officers). Officers promoted to the grade of O6 during the school term will continue to be eligible to use the State Tuition and Textbook Reimbursement Program until the end of that term.

(2) Successful completion of Basic Training (BT) or Basic Military Training (BMT).

(3) Current members of the Minnesota National Guard must maintain membership throughout the entire term for which reimbursement is tendered. If members enlist during a school term, they will be eligible for payment upon completion of basic training, provided all other criteria are met. See paragraph 2-6 for application procedures.

b. Satisfactory participation. Members who do not meet the criteria listed below will be terminated from the program as of the term in which they became ineligible and through the remainder of the state fiscal year. Each state fiscal year begins on 1 July and ends on 30 June.

(1) NO periods of unauthorized absence (i.e. AWOL) during the period 1 July through 30 June.

(2) No more than four periods of excused absence during the period 1 July through 30 June.

c. Exception to Policy

(1) When exceptional circumstances cause a soldier to accumulate more than four periods of excused absence during a year, the service member may request an exception to policy.

(2) The member must initiate the request for exception and forward it through the chain of command for verification and endorsement.

(3) The Education Services Officer (ESO) will not consider waivers for Unsatisfactory Performance or AWOL.

d. Course Requirements

(1) Courses must be taken at a post secondary educational institution approved for veteran's benefits.

(2) The course of study must be eligible for placement on a transcript from the educational institution.

(3) Courses that earn Continuing Education Units (CEUs) are NOT eligible for the State Tuition Reimbursement Program, unless the course is required to maintain proficiency in a selected MOS. Contact the Education Services Officer to determine course eligibility.

e. Satisfactory Completion of Coursework

(1) Undergraduate Work. The minimum grade requirement for undergraduate work is a "C" "Pass" or "Satisfactory." Members are not reimbursed for courses if they "withdraw" or receive a grade of "C-" or lower.

(2) Graduate Work. The minimum grade requirement for graduate work is a "B." Members are not reimbursed for courses if they "withdraw" or receive a grade of "B-" or lower.

f. Incomplete Courses. The ESO will reimburse members upon completion of the course, if the grade requirements outlined above are met. The procedure for submitting for reimbursement for incomplete coursework is outline in 2-7a.

g. A member must request tuition reimbursement within 60 days of the last official day of the term for all coursework attempted during the term.

2-4. **MAXIMUM BENEFIT.** Maximum benefit under the State Tuition Reimbursement Program is funding for 208 quarter/144 semester credits.

2-5. RATE OF REIMBURSEMENT.

- a. The Minnesota National Guard will reimburse 80% of the tuition charged for eligible coursework (undergraduate and graduate) at accredited post-secondary institutions, not to exceed 80% of the University of Minnesota Twin Cities campus, Undergraduate per credit tuition rate.
- b. The service member's fee statement is the source document for determining the amount of reimbursement. If the fee statement does not clearly show the amount of tuition charged, the soldier must obtain a letter from the institution that states the amount of tuition charged and a point of contact at the institution.
- c. The maximum number of credits reimbursed per term is 18.
- d. The Tuition Reimbursement Program will not reimburse for fees.
- e. If a service member receives a tuition waiver, (no tuition paid or the fee statement indicates no tuition charges), reimbursement is not authorized. For example, high school students who attempt post-secondary coursework, where the courses are paid for by the high school, school district, or state, are not eligible to receive reimbursement for this coursework.

2-6. APPLICATION PROCEDURES.**a. Service Members' Responsibilities**

(1) The soldier will read and sign the "Memorandum of Understanding" (MOU) (Annex A) annually. This memorandum specifically outlines the member's responsibility for obtaining reimbursement under the State Tuition and Textbook Reimbursement Program.

(a) Service member must review the state circular annually and sign a new MOU.

(b) Service member must submit the signed MOU to his or her unit. Do not forward to the Education Service Office.

(2) The service member must complete an "Annual Obligation Request." Units must enter the obligation into the automated system. Failure to obligate may result in suspension until after the end of the state fiscal year, to ensure funds are available for those who obligated.

(a) The service member will complete the MN-NG Form 621-5-1-R-E, (Annual Obligation Request) and submit it to the unit prior to beginning classes. Service members who enlist into the MN National Guard during a school term must submit the Annual Obligation Request prior to requesting payment.

(b) The annual obligation is an estimate of tuition cost for each term during the school year. The actual amount of reimbursement is dependent on the cost of tuition and the number of credits completed. The current school year is Summer Session II 2004 through Summer Session I 2005.

(3) The service member will submit a tuition reimbursement "Payment Request". Service member must submit the following forms and supporting documents to the unit in sufficient time for the reimbursement request to be entered into the payment request system within 60 days after the last official day of the term. See paragraph 2-7 for information on incomplete coursework or late requests for reimbursement. Soldiers and Airmen enrolled in accelerated programs, where several terms are completed during the course of a normal semester should submit their requests in groups that correspond with a normal semester.

(a) Payment Request, MN-NG Form 621-5-2-R-E (See Annex A)

(b) Grade Report. Reports downloaded from the Internet are acceptable.

(c) Fee statement that clearly shows the amount of tuition charged. If the fee statement does not clearly show the amount of tuition charged, the soldier must obtain a letter from the institution that states the amount of tuition charged and a point of contact at the institution.

b. Unit Responsibilities.

(1) Memorandum of Understanding. Ensure service member reads and signs the MOU annually. Provide the member with a copy and maintain a copy in the member's education file. NOTE: The MOU should not be forwarded to the ESO.

(2) Soldiers and Airmen must obligate for tuition reimbursement annually. Soldiers and Airmen who have not obligated will not be reimbursed for their tuition. Enter annual obligations into the web-based tuition reimbursement program for each member participating in the program to the ESO. Do not send paper copies of the obligation to the ESO.

(3) Enter payment requests into the system immediately upon receipt from the soldier. All requests for reimbursement must be submitted within 60 days of the last day of the school term. Prior to forwarding, the unit will complete the following:

(a) Perform quality review to ensure that the information is complete and that the member has submitted a fee statement that clearly shows the amount of tuition charged and an original grade report.

(b) Verify that the service member has completed Basic Training. If the service member has not completed basic training, click on "no" in the web-based tuition reimbursement program and fill in an estimated completion date. Upon completion of basic training, the unit must change the status to "yes". This will bring the soldier's request into the state incentives manager's active payment requests.

(c) Verify that the service member is in good standing. Service member can have no more than four periods of excused absence. Service member can have no periods of unexcused absence. If the service member is not in good standing, return to request to the member without action.

(4) Communicate with the ESO to facilitate the administration of the tuition reimbursement program.

c. ESO Responsibilities.

(1) The ESO will allocate funds according to the Annual Obligation Request.

(2) Process payment requests.

(a) Verify all information is correct. This may include contacting the member's school.

(b) Calculate the actual amount of reimbursement.

(3) Suspend payment for service members who have not completed basic training until notification that the training is complete. Process for payment upon notification of completion.

(4) Suspend payment on Requests for Reimbursement that arrived at the ESO in excess of 60 days after the last official day of the school term. Process after 1 July providing funds remain for the State fiscal year.

2-7. INCOMPLETE COURSEWORK AND LATE REQUESTS.

a. Incomplete Coursework

(1) If the student has an incomplete, the request for tuition reimbursement should NOT be held by the member or the unit until completion of all of the courses. Request payment for the completed courses.

(2) Submit request for completed courses within 60 days after the last official day of the term; the ESO will reimburse for these courses.

(a) In the comments block, annotate the classes that are incomplete and the expected completion date.

(b) Submit request for reimbursement, along with fee statement and grades to the unit.

(c) Retain a copy of this form and paperwork to submit upon completion of coursework.

(3) Upon completion of the coursework, fill-out a new MN-NG Form 621-5-2-R-E, requesting reimbursement for only the courses that were originally incomplete but are now complete. Provide this request along with a grade report showing satisfactory completion and a copy of the original request to the unit.

b. Late Requests for Tuition Reimbursement.

(1) If a service member misses the 60-day suspense, he/she should still submit their request for reimbursement as soon as possible. However, late requests will be held for payment until after 1 July 2004. Requests will be paid in the order received, providing funds are available for that fiscal year. The ESO does not guarantee payment of requests received after the 60-day window.

(2) The deadline for requesting reimbursement for coursework completed prior to July 2004 (SY03-04) is 15 December 2004.

2-8. TERMINATION. The submission of a falsified grade report, transcript or fee statement or the attempt to receive funds to which a member is not due will result in the termination from the State Tuition Reimbursement Program for a minimum of one year from the date of detection.

CHAPTER 3
TUITION REIMBURSEMENT - SURVIVOR ENTITLEMENT

3-1. **OVERVIEW.** If a member of the Minnesota National Guard is killed while performing military duty, his or her surviving spouse and/or surviving dependents (to include biological children of the deceased born within 10 months after the member's death), become eligible for the State of Minnesota funded post-secondary tuition reimbursement entitlement.

3-2. **SCOPE.** This entitlement covers accident related deaths that occur within the scope of a Guardmember's assigned duties, while in a federal duty status or on state active service, as defined in Minnesota Statutes section 190.05. This entitlement also covers accidental death that occurs while directly enroute to or from the member's home of record and place of duty. Deaths from natural causes or suicide are not included within this benefit.

3-3. **ELIGIBILITY.**

- a. The surviving spouse remains eligible for the benefit unless they remarry.
- b. Surviving dependents are eligible until their 24th birthday.

3-4. **PROCEDURES.**

a. The Office of the Adjutant General will issue a Letter of Eligibility that outlines the Tuition Reimbursement entitlement. The ESO will forward the letter to the surviving spouse; if no spouse, the oldest adult dependent; or the guardian of minor children. The letter will indicate by name, date of birth and social security number the dependents eligible for tuition reimbursement.

b. The Minnesota Army National Guard Military Education Services Office will manage this benefit program and maintain files on all Letters of Eligibility issued.

3-5. **GUIDELINES.**

a. The entitlement reimburses tuition costs only. Activity fees, computer user fees, registration fees, segregated fees, books, room and board expenses, and other school-related fees are not reimbursable under this program.

(1) Maximum benefit is 144 semester credits or 208 quarter credits.

(2) Benefit may be applied at any post-secondary degree or certification program that is approved for VA Benefits.

b. Reimbursement Guidelines. The ESO will reimburse 100% of the tuition costs, not to exceed 100% of the resident tuition costs charged at the University of Minnesota Twin Cities campus, Undergraduate per credit tuition rate. Maximum number of credits reimbursed is 18 semester credits.

c. Satisfactory Completion of Coursework.

(1) Undergraduate Work.

(a) The minimum grade requirement for undergraduate work is a "C," "Pass" or "Satisfactory."

(b) Students are not reimbursed for courses from which they "withdraw" or receive a grade of "C-" or lower.

(2) Graduate Work.

(a) The minimum grade requirement for graduate work is a "B."

(b) Students are not reimbursed for courses from which they "withdraw" or receive a grade of "B-" or lower.

(3) Students must request tuition reimbursement within 60 days of the last official day of the term. For information on late requests for reimbursement or incomplete coursework, see paragraph 3-7a.

3-6. PAYMENT PROCEDURES.

a. "Memorandum of Understanding" (Annex A.).

(1) This memorandum specifically outlines the student's responsibility for obtaining reimbursement under the Minnesota State Tuition and Textbook Reimbursement Program.

(2) Annually, the student must carefully read, sign and submit the MOU to ESO.

b. Annual Obligation Request.

(1) Complete the MN-NG Form 621-5-1-S, (Annual Obligation Request-Survivor Benefit) Submit form to the ESO prior to beginning classes.

(2) The annual obligation is an estimate of tuition cost for each term during the school year. The actual amount of reimbursement is dependent on the cost of tuition and the number of credits completed. The current school year is Summer Session II 2004 through Summer Session I 2005.

c. Request for Reimbursement

(1) Student must submit the following forms and supporting documents to the ESO within 60 days after the last official day of the term.

(a) Payment Request, MN-NG Form 621-5-2-S (Annex A).

(b) Grade Report. Reports downloaded from the internet are acceptable.

(c) Fee statement that clearly shows the amount of tuition charged. If the fee statement does not clearly show the amount of tuition charged, the student must obtain a letter from the institution that states the amount of tuition charged and include a point of contact at the institution.

(2) By signing this application, the student is verifying that all information is true and correct. It also authorizes the ESO to contact the school to verify course grades.

3-7. INCOMPLETE COURSEWORK AND LATE REQUESTS.

a. Incomplete Coursework.

(1) If the student does not complete a course, submit only the completed course for tuition reimbursement. Do not wait until all courses are complete before requesting reimbursement.

(2) Submit request for payment for completed courses within 60 days of the last official day of the term; the ESO will reimburse for these courses.

(a) In the remarks block, annotate which courses which are incomplete and the expected completion date.

(b) Submit request for reimbursement, along with fee statement and grades to the ESO.

(c) Retain a copy of this form and paperwork to submit upon completion of coursework.

(3) Upon completion of the coursework, fill-out a new ESO Form 621-5-2-R-E, requesting reimbursement for only the courses that were originally incomplete but are now complete. Provide this request along with a grade report that documents satisfactory completion and a copy of the original request to the ESO.

b. Late Requests for Tuition Reimbursement.

(1) If a student misses the 60-day suspense, he/she should still submit their request for reimbursement as soon as possible, however, it will be held for payment until after 1 July 2004. Requests will be paid in order received, providing funds are available for that fiscal year. The ESO does not guarantee payment of requests received after the 60-day window.

(2) The deadline for requesting reimbursement for coursework completed prior to July 2004 (school year 2003-2004) is 15 December 2004.

3-8. TERMINATION.

a. Any student who submits a falsified grade report, transcript or fee statement that does not accurately reflect final course grades, or attempts to receive funds to which he or she is not due, will be terminated from this program for a minimum of one year from the date of detection.

b. The ESO will terminate the entitlement for the surviving dependents on the dependent's 24th birthday. The dependent will be paid for the term during which he/she turns 24.

c. The ESO will terminate the benefit for the surviving spouse in the event of remarriage. The spouse will be paid for the term during which he/she remarries.

CHAPTER 4**MEDICAL and DENTAL TUITION REIMBURSEMENT**

4-1. **PURPOSE.** To encourage physicians and dentists to accept a Medical Corps commission in the Minnesota National Guard upon completion of medical or dental school.

4-2. **RATE OF REIMBURSEMENT.** This program pays tuition reimbursement for medical and dental students, not to exceed 80% of the tuition costs at the University of Minnesota, Medical or Dental Schools, Twin Cities campus.

4-3. **ELIGIBILITY.** Army officers appointed as medical students (AOC 00E67) and Air Guard officers appointed in the Medical Service Corps are eligible for this program. The number of participants enrolled in the program cannot exceed eight Army officers and two Air Guard officers at a time.

4-4. **ROLE OF AMEDD OFFICER AND RETENTION MANAGER.** Assist the Education Services section in monitoring the Medical and Dental School Tuition Reimbursement program by monitoring the number of students in the program and their eligibility for benefits.

4-5. APPLICATION PROCEDURES.**a. Memorandum of Understanding for Medical and Dental Students.**

(1) "Memorandum of Understanding for Medical and Dental Students." Obtain the MOU from the AMMED Officer or the Retention Manager.

(2) The MOU specifically outlines the officer's responsibility for obtaining reimbursement under the Minnesota State Tuition Reimbursement Program.

(3) The officer must carefully read, sign and submit the MOU to the AMEDD Officer or Retention Manager annually.

b. Annual Obligation Request.

(1) Complete the MN-NG Form 621-5-1-R-E, (Annual Obligation Request) Submit form to AMEDD officer prior to beginning classes.

(2) The annual obligation is an estimate of tuition cost for each term during the school year. The actual amount of reimbursement is dependent on the school, credits and terms attended. The current school year is Summer Session II 2004 through Summer Session I 2005.

c. Requests for Reimbursement.

(1) The officer must submit the following forms and supporting documents to the AMEDD officer or Retention Manager in sufficient time for the reimbursement request to arrive at the ESO within 60 days after the last official day of the term.

(a) Payment Request, ESO Form 621-5-2-R-E (Annex A)

(b) Original Grade Report. Reports from the internet are acceptable.

(c) Fee statement that clearly shows the amount of tuition charged. If the fee statement does not clearly show the amount of tuition charged, the officer must obtain a letter from the institution that states the amount of tuition charged and include a point of contact at the institution.

(2) The officer's signature on the form verifies that all information is true and correct. It also authorizes the ESO to contact the school to verify course grades.

(3) The ESO does not guarantee payment on any request received in excess of 60 days after the last official day of the term. See paragraph 4-6a for information on submitting requests for late payment and incomplete coursework.

4-6. INCOMPLETE COURSEWORK AND LATE REQUESTS.

a. Incomplete Coursework.

(1) If the officer receives incompletes, the request for tuition reimbursement should NOT be held until completion of all of the courses. Submit for courses completed.

(2) Submit a request for courses completed within 60 days of the last official day of the term; the ESO will reimburse for these courses.

(a) In the comments block, annotate the classes that are incomplete and the expected completion date.

(b) Submit request for reimbursement, along with fee statement and grades to the unit.

(c) Retain a copy of this form and paperwork to submit upon completion of coursework.

(3) Upon completion of the coursework, fill-out a new MN-NG Form 621-5-2-R-E, requesting reimbursement for only the courses that were originally incomplete but are now complete. Provide this request along with a grade report that documents satisfactory completion and a copy of the original request to the AMEDD Officer.

b. Late Requests for Tuition Reimbursement.

(1) The officer may submit a request for reimbursement after the 60-day window; however, the request will be held for payment until after 1 July 2004. (The state fiscal year is July-June.) Requests will be paid in the order received, providing funds are available for that fiscal year. The ESO does not guarantee payment of requests submitted after the 60-day window.

(2) The deadline for requesting reimbursement for courses completed between July 2003 and June 2004 (SY03-04) is 15 December 2004.

4-7. SERVICE OBLIGATION AND RECOUPMENT.

a. Contractual Service Obligation: Upon graduation from medical school, the officer must serve the same number of years in the MN National Guard that he/she participated in the program.

b. The officer must remain in an active status in the National Guard for their entire contracted service obligation.

c. Termination of medical school enrollment does not waive the officer's service obligation.

d. The ESO will recoup a prorated amount of the total amount reimbursed if the officer does not fulfill their contracted service obligation.

e. Participation in this program does not prohibit participation in the Specialized Training Assistance program (STRAP) or Health Professional Loan Repayment program (HPLRP).

CHAPTER 5**LEADERSHIP EXCELLENCE AND DEDICATED SERVICE (LEADS) SCHOLARSHIP**

5-1. **GENERAL.** The Minnesota National Guard will award a maximum of 30 \$1,000 LEADS Scholarship to selected high school seniors who complete the application process and become a member of the Minnesota National Guard. Guard members may receive this scholarship in addition to the Minnesota State Tuition Reimbursement.

5-2. **PURPOSE.** Recognize high school seniors based upon demonstrated leadership, community service and potential for success in the Minnesota National Guard.

5-3. **ELIGIBILITY.**

- a. Applicant must be a high school senior.
- b. Membership with the Minnesota National Guard is required for scholarship payment.
- c. Applicant must be selected by the LEADS Scholarship selection committee.
- d. Recipient must complete basic training prior to receiving payment.

5-4. **APPLICATION PROCEDURES.**

- a. Application packets will contain the following items:
 - (1) Coversheet (Annex B1.a)
 - (2) Essay (Annex B1.c)
 - (3) Commander's Recommendation (Annex B1.e)
 - (4) Letter of Recommendation from Community Leader (Annex B1.d)
 - (5) High School Transcripts (Annex B1.b)
 - (6) Resume that highlights leadership activities and volunteerism.
- b. Additional items that may accompany the application:
 - (1) Letters of Recommendation from Teachers/Coaches
 - (2) Newspaper Articles that feature the applicant

5-5. **PROCEDURES.**

- a. Applicant's Responsibilities.
 - (1) Prepare essay and resume.
 - (2) Request and obtain a minimum of one letter of recommendation from a community leader. Additional letters from teachers or coaches are recommended.
 - (3) Request a letter of recommendation from unit commander or first sergeant. If the applicant is not a current member of the Minnesota National Guard, this letter may be from any current officer of the National Guard.

- (4) Obtain a school certified copy of high school transcripts.
- (5) Submit complete application to unit so that it can arrive at the ESO no later than 15 March 2004.
 - (a) The ESO will return late scholarship applications without consideration for the award.
 - (b) The ESO will return incomplete scholarship applications without consideration for the award.
 - (6) The selection committee will consider the applicants' ability to follow instructions in determining scholarship recipients.
- b. Unit Responsibilities.
 - (1) Contact all members who are high school seniors to inform them of the scholarship.
 - (2) Assist applicant in preparing application.
 - (3) Ensure that the application contains all required documents and forward to the ESO no later than 15 March 2004.
- c. Unit Commander/First Sergeant will prepare a letter of recommendation for the applicant that evaluates and scores the applicant based upon the following characteristics:
 - (1) Leadership Potential
 - (2) Maturity
 - (3) Military Appearance
 - (4) Communication Skills
 - (5) Overall Assessment
- d. Recruiting NCOIC's Responsibilities.
 - (1) Promote scholarship in unit schools and local media.
 - (2) Assist ESO in coordinating the dates and locations of the award presentations.
 - (3) Attend award banquets to present awards if needed.
- e. ESO Responsibilities.
 - (1) Advertise the LEADS Scholarship Program.
 - (2) Maintain a database of the applicants.
 - (3) Select and organize the scholarship selection committee.
- f. Scholarship Selection Committee's Responsibilities.
 - (1) Evaluate all scholarship applications.
 - (2) Recommend a maximum of 30 recipients to the Director of Personnel.
- g. The Director of Personnel will approve or disapprove the awarding of the scholarships.

5-6. AWARD NOTIFICATION.

- a. The ESO will announce the recipients no later than 1 May 2005.
- b. The ESO will prepare and send award letters to the recipients.

(1) The ESO will send a preliminary award letter to selected scholarship recipients that are not members of the National Guard. Non-members must enlist in the Minnesota National Guard and complete basic training to receive the award.

(2) Selected scholarship recipients that are members of the Minnesota National Guard will receive an award letter from the ESO.

5-7. POST AWARD PROCEDURES.

a. Upon completion of basic training or basic military training, the scholarship recipient will provide his/her unit with the following information:

- (1) Name of school attending.
- (2) Address of the financial aid office.
- (3) The school term for which the award is requested.

- b. Unit will submit a request for payment to the ESO. See Annex B for sample request.
- c. The ESO will make payment to the academic institution in the student's name.

CHAPTER 6**COMMISSIONING BONUS**

6-1. **GENERAL.** The Adjutant General has authorized a \$1,000 bonus upon initial commissioning/appointment for Soldiers and Airmen in the Minnesota National Guard. Soldiers and Airmen accepting a commission or appointment in specific critical branches are eligible for an additional \$1,000 critical skill bonus. Members of the Air National Guard who commission through the Commissioned Officer Training School (COTS), Medical Officer Training School (MOTS), or the Reserve Commissioned Officer School (RCOTS) will receive a \$3000 bonus. The Commissioning bonus was established to enhance the officer/warrant officer strength of the Army National Guard and specific low-density positions within the Air National Guard.

6-2. **ELIGIBILITY.** Soldiers and Airmen receiving a commission or appointment from Federal or State Officer Candidate School (OCS), the Warrant Officer Candidate School (WOCS), or Air Guard Commissioned Officer Training School (COTS) are eligible for the commissioning bonus. Soldiers and Airmen who have previously held a commission or have been appointed as a warrant officer in any branch of service are ineligible for this bonus. Soldiers and Airmen who started their commissioning/appointment course prior to 1 July 2004 will receive the bonus in accordance with the circular for that fiscal year.

a. Fulltime members of the Minnesota National Guard who are commissioned or appointed after 1 July 2004 are eligible for the State Commissioning Bonus.

b. Soldiers and Airmen receiving a direct commission after 1 July 2004 are eligible for the commissioning and critical skill bonus.

c. Soldiers and Airmen electing the following branches will receive the additional \$1000 critical skill bonus:

(1) Commissioned Officer Branches: 11, 12, 13, 74, 25

(2) Warrant Officer Branches: 350, 420, 550, 918, 920, and 922

(3) Members of the Air Guard accepting a commission through the Commissioned Officer Training School (COTS) will receive the critical skill bonus in addition to the basic commissioning bonus for their initial commission.

6-3. PAYMENT PROCEDURES.

a. Army National Guard. RRM and/or the officer's section will coordinate with the ESO so the officer can be processed for payment. A check will be sent to the officer's home address, unless otherwise requested.

b. Air National Guard. The Base Education Training Manager at each of the air bases will e-mail the name SSN, and address of those who complete the COTS to the Education Services Office so the officer can be processed for payment. A check will be sent to the officer's home address, unless otherwise requested.

6-4. **TAXES.** Taxes are not withheld from the payment. The bonus recipient is responsible to report this payment as income when they fill out their taxes each year.

6-5. **RECOUPMENT.** The critical skills bonus may be recouped if the officer does not complete the Officer Basic Course of the critical skill in which he/she was appointed.

The proponent of this Minnesota National Guard Circular is the Joint Force Headquarters – J1. Users are invited to send comments, suggested improvements and changes on DA Form 2028 (Recommended Changes to Publications and Blank Forms) directly to the Adjutant General, Minnesota Army National Guard, ATTN: JFMN-J1R-D, 20 West 12th Street, St. Paul, MN 55155-2098.

FOR THE ADJUTANT GENERAL:

OFFICIAL:

//// SIGNED ////
WILLIAM F. KOLBINGER
Col, MNANG
Joint Force Headquarters – J1

DISTRIBUTION:
A (Air/Army)

ANNEX A**MINNESOTA STATE TUITION REIMBURSEMENT PROGRAM
MEMORANDUM OF UNDERSTANDING FALL 04-SUMMER 05****A-1. ACKNOWLEDGEMENT STATEMENT.**

I, _____, acknowledge that I have read this memorandum prior to signing and fully understand the policies and procedures of the Minnesota State Tuition Reimbursement Program as described in Minnesota National Guard Circular 621-5-1 and this MOU.

A-2. INTRODUCTION.

a. The State of Minnesota sponsors the Tuition Reimbursement Program. The state legislature appropriates funds for this program biennially. If in the future, the state does not fund the Tuition Reimbursement Program, I understand that neither the State of Minnesota nor the Minnesota National Guard is obligated to continue the benefit.

b. I also understand that if I do not meet the all criteria outlined in Minnesota National Guard Circular 621-5-1, dated 1 Jul 04, I may jeopardize my entitlement to receive reimbursement.

A-3. CRITERIA FOR PARTICIPATION.

a. To be eligible for payment of tuition reimbursement, I must meet the following membership criteria:

(1) I must be a member of the Minnesota National Guard; grades from E-1 through O-5 (to include Warrant Officers.) If I am a lieutenant colonel, promoted to colonel during a school term I will not be eligible to participate in the program for future school terms.

(2) I must successfully complete of Basic Training (BT) or Basic Military Training (BMT).

(3) I must maintain membership in the Minnesota National Guard throughout the entire term for which reimbursement is tendered. If I become a member during a school term, I will be eligible for payment upon completion of basic training, provided all other criteria are met. See Chapter 2, paragraph 2-6 for instructions for submitting requests.

b. I understand that to receive payment under this program that I must follow the rules regarding satisfactory participation:

(1) I can have no periods of unauthorized absence (i.e. AWOL) during the period of 1 July through 30 June of each year while participating in the program.

(2) I can have no more than four periods of Excused Absence during the period of 1 July through 30 June each year.

c. I understand the following additional requirements:

(1) I must attend a post secondary educational institution approved for VA benefits.

(2) I will be reimbursed only for courses that are eligible for placement on a transcript from the educational institution. Courses that earn Continuing Education Units (CEUs) are not eligible for the Minnesota State Tuition Reimbursement Program.

(3) The maximum benefit that I may receive under this program is equivalent to 208 quarter/144 semester credits, beginning with coursework starting 1 July 1996 and later.

d. I must complete coursework in accordance with the following guidelines:

(1) Undergraduate Study. I must achieve a grade of "C" or better, "Pass" or "Satisfactory." I understand that the National Guard will not reimburse me for any course from which I "withdraw" or receive a grade of "C-" or lower.

(2) Graduate Work. I must achieve a grade of "B" or better. I understand that the National Guard will not reimburse me for any course from which I "withdraw" or receive a grade of "B-" or lower.

e. Incomplete Courses. I understand that I will be eligible for reimbursement for the course upon completion, if the grade requirements outlined above are met. See chapter 2, paragraph 2-7 for procedures.

A-4. REIMBURSEMENT PROCEDURES.

a. Memorandum of Understanding. Annually, I will carefully read, sign and submit a MOU to my unit.

b. Annual Obligation Request.

(1) I must complete the MN-NG Form 621-5-1-R-E, (Annual Obligation Request) and submit it to my unit prior to beginning classes. If I enlisted during a current school term I will submit the Annual Obligation Request immediately and understand that the ESO will reimburse me for the current school term upon completion of basic training.

(2) I understand that the annual obligation is an estimate of tuition cost for each term during the school year. The actual amount of reimbursement is dependent on the school, credits and terms attended. The school year is Summer Session II 2004 through Summer Session I 2005.

(3) I understand that failure to obligate may result in not being paid.

c. Request for Reimbursement Payment:

(1) I must submit the following forms and supporting documents to my unit in sufficient time for them to arrive at the ESO within 60 days after the last official day of the term.

(a) Payment Request, MN-NG Form 621-5-2-R-E.

(b) Original Grade Report. Grades from the internet are acceptable.

(c) Fee statement that clearly shows the amount of tuition charged. If the fee statement does not clearly show the amount of tuition charged, I will obtain a letter from the institution that states the amount of tuition charged and lists a point of contact at the institution.

(2) I understand that my signature on the MN-NG Form 621-5-2-R-E will verify that all information is true and correct. My signature also authorizes the ESO to contact the school to verify course grades.

(3) I understand that I must submit my request for tuition reimbursement within 60 days after the last official day of the course.

(a) I understand that if I fail to meet this suspense, I must submit the request for reimbursement immediately thereafter but the ESO does not guarantee reimbursement.

(b) I understand that I will not receive payment for late requests until after 1 July 2004 providing there are funds remaining for the State fiscal year.

A-5. NATIONAL GUARD MEMBER'S RESPONSIBILITIES

a. I understand that it is my responsibility to ensure that my application for the Minnesota State Tuition Reimbursement Program is submitted within the guidelines indicated herein and in accordance with MN NG Cir 621-5-1. Late requests for reimbursement will delay my reimbursement until after the end of the state fiscal year and will be processed only if sufficient funds exist.

b. I further understand that any attempt to submit falsified documents will result in my termination from the State Tuition Reimbursement Program for a MINIMUM of one year from the date of detection.

c. I fully understand the directives outlined herein and in MN-NG CIR 621-5-1 and my responsibilities for participation in the Minnesota state tuition reimbursement program.

Signature of Service Member Date Signature of Unit Rep. Date

**MINNESOTA NATIONAL GUARD
STATE TUITION REIMBURSEMENT PROGRAM
ANNUAL OBLIGATION REQUEST**

Name: _____ SSN: _____ Rank: _____
(Last, First, MI)

Current Mailing Address: _____

City: _____ State: _____ Zip Code: _____

Phone Number: _____ Soldier/Airmen Email Address: _____

Pay Grade: _____ Enlistment Date: _____ Assigned Unit: _____

Birth Date: _____ Sex: Male _____ Female _____ Race: _____

Unit Phone Number: _____ Unit Email Address: _____

Education Level: _____

Course Type: Voc/Tech _____ Under Grad _____ Graduate _____ Dist Learning _____ Independent Study _____

School Year: _____ School Attending: _____

Anticipated credits for the school year:

Fall _____ Winter _____ Spring _____ Summer1 _____ Summer2 _____

Have you completed basic training or basic military training? Yes No

If no, what is the estimated completion date of training? _____

Remarks:

I understand that this Annual Obligation Request is only an estimate and that the actual amount of tuition reimbursement will be based on the actual cost of tuition. I understand that I must complete all coursework at least a "C" grade or better for undergraduate and "B" or better for post-baccalaureate/graduate-level coursework

I further understand that it is my responsibility to ensure that my requests for reimbursement are forwarded to the Education Services Office within 60 days of the last day of the term.

SIGNATURE

DATE

MINNESOTA NATIONAL GUARD
STATE TUITION REIMBURSEMENT PROGRAM
PAYMENT REQUEST

INSTRUCTIONS: Complete this form, attach original grade report and a fee statement and submit to your unit. The form must arrive at the ESO within 60 days after the last official day of the term. NOTE: The check will be mailed to the address listed on this form and cannot be forwarded. If you will be moving within 60 days, provide a permanent address.

Name: _____ SSN: _____

Current Mailing Address: _____ City: _____ State: _____

Zip Code: _____ Email Address: _____ Telephone: _____

Unit: _____ Member Status: AGR Technician M-Day/Traditional

Unit Phone Number: _____ Unit Email Address: _____

Course Type: Undergraduate Study _____ Graduate Study _____ Dist Learning _____ Independent Study _____

School Year _____ School Attended _____

TERM: Fall _____ Winter _____ Spring _____ Summer _____ Summer2 _____ Clock Hours _____

Total Number of Credits Attempted: _____ Credits Eligible for Reimbursement : _____ Tuition Charged: \$ _____

Note: Fee statement or letter from the school must reflect the actual amount of tuition charged.

Have you completed basic training or basic military training? [] Yes [] No

If no, what is the estimated completion date of training? _____

Did you receive ACES or DAN TES Tuition Assistance? [] Yes [] No If so, what was the amount? _____

Did you receive a state enlistment bonus? [] Yes [] No

Remarks: _____

I verify that the address and information on this form is correct. The documentation I have submitted, herewith, is true and correct.

Signature

Date

Unit Administrator's Use Only:

I have verified that the service member meets the following requirements for participation in the program:

- _____ The service member has completed basic training or basic military training.
_____ The service member has no more that four excused absences from 1 July 2003 through 30 June 2004.
_____ The service member has no unexcused absences from 1 July 2003 through 30 June 2004.

Printed name of Unit Administrator

Unit Phone #

Date

ANNEX B

LEADS SCHOLARSHIP APPLICATION PROCEDURES

B-1. APPLICATIONS WILL CONSIST OF THE FOLLOWING

a. Coversheet. On a blank sheet of paper type the following information:

- (1) Full name
- (2) SSN
- (3) Address
- (4) Unit
- (5) Unit Point of Contact with Telephone Number
- (6) School
- (7) School Address and Telephone Number
- (8) Current cumulative grade point average on a 4.0 scale

b. High school transcripts, with a school counselor's signature or certification.

c. Essays. Prepare a two-page, double-spaced essay on a situation where you had to overcome and obstacle and describe the impact that situation had on you.

d. Letter of Recommendation from Community Leader.

- (1) Letter should state specific examples of school or community service
- (2) Letter should comment on maturity and leadership potential.
- (3) Applicant may also include letters from schoolteachers or counselors.

e. Commander's Letter of Recommendation.

(1) On a scale of 1-5, with one being low and five being high, the unit Commander or First Sergeant will rate the individual on the characteristics listed below. The Commander or First Sergeant should provide the numerical score for each item, followed by narrative comments.

(a) Appearance. Does the applicant appear fit for military service and look the part of a future leader?

(b) Communication ability. Did the applicant clearly and directly answer the questions and communicate his or her thoughts?

(c) Maturity. Does the applicant appear ready to assume leadership roles?

(d) Leadership potential. In your opinion, does this person have what it takes to become a good NCO or Officer?

(e) Overall assessment. Would you want this person to be in your Unit? Would he/she be an asset to the National Guard?

(2) Letter of recommendation should be specific and site example B-2. SUSPENSE

- a. All applications must arrive at the ESO no later than 15 March 2004.
- b. The ESO will return late or incomplete applications without consideration for the scholarship.

Private John E. Doe
1234 Street
Hometown, MN 55123

Unit Information
Member of Btry B(-) 1-125 FA
Unit Point of Contact: SFC Snuffy
(XXX) XXX-XXXX

School Information
My School
1234 Road
Hometown, MN 55123
(XXX) XXX-XXXX

Cumulative GPA
3.9

Office Symbol

Date

MEMORANDUM FOR Director of Personnel, ATTN: MNAG-PER-E, 20 W. 12th St. St Paul, MN 55155

SUBJECT: Request for Payment of LEADS Scholarship, *PVT John E. Snuffy, 123-45-6789*

1. Request payment of LEADS scholarship for the above named individual. *PVT Snuffy* was selected for the 2000 LEADS scholarship.
2. *PVT Snuffy* completed basic training on 18 August 2000.
3. *PVT Snuffy* will attend *University of Minnesota Duluth* during Fall semester 2000. The address of the school's Financial Aid Office is: *University of Minnesota-Duluth, Darland Administration Building, ATTN: Financial Aid, Duluth, MN 55812-2496.*

FOR THE COMMANDER:

JOE SMITH
SFC, MN ARNG
Unit Administrator