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

MN National Guard Circular 621-5-1

1 July 2009

Military Personnel

MINNESOTA NATIONAL GUARD STATE INCENTIVE PROGRAMS

Summary: This circular supersedes Minnesota National Guard Circular 621-5-1, dated 1 July 2008 with changes and is in effect until June 30, 2010, unless superseded. It provides information and describes procedures for administering the Minnesota State Incentive 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 (Manpower & 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. This circular becomes obsolete on the expiration date shown above, unless sooner rescinded or amended.

SUMMARY OF CHANGES

- Chapter 1, Overview,
 - Deployability and suspension of favorable actions are additional criteria for satisfactory participant.
- Chapter 2, State Tuition Reimbursement Program:
 - ROTC Leadership Course is accepted along with Basic Training and Basic Military Training for establishing eligibility for STR.
 - Clarification of what courses are eligible for reimbursement when a service member enlists or ETS.
 - MOU must be signed annually, filed at unit level, and must be available for inspection upon request by the ESO.
 - The combination of Federal Benefits which pay tuition costs directly to the institution and State Tuition Reimbursement cannot exceed 100% of the tuition cost or the State Tuition Reimbursement maximum credit hour benefit.
 - Students must submit final fee statement which must contain all other Federal Benefits which pay tuition costs directly to the institution.
 - Students and units must submit the completed annual obligation request form within 45 days of the service member's course start date. Failure to obligate within 45 days of the course start date will result in non-payment.
 - Students and units must submit the STR payment request no later than 90 days from the last official day of the term. Failure to submit payment request form within 90 days will result in non-payment.
 - Payment request form has changed. Previous payment request forms are obsolete and will not be accepted.
 - Payment request form, final fee statement and grade report must be uploaded into the state database at time of payment request.
- Chapter 3, Tuition Reimbursement – Survivor Entitlement:
 - The surviving spouse is eligible regardless of remarriage.
- Chapter 6, State Reenlistment Bonus:
 - Service members are not eligible for a State Reenlistment Bonus if they receive a Federal Reenlistment bonus for an amount equal to or greater than the State Reenlistment Bonus
 - Permanent AGR and TECHNICIANS are no longer eligible for the State Reenlistment Bonus
- Chapter 7, Medic Recertification Bonus Program:
 - Service member must have a current National Registry of Emergency Technicians Card (NREMT) and provide copy of NREMT card when applying for Medic Bonus.
- LEADS Scholarship.
 - The LEADS scholarship program is discontinued

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CHAPTER 1

OVERVIEW

1-1. **GENERAL.** The Minnesota Legislature enacted legislation that provides funds for State Incentive Programs for members of the Minnesota National Guard. This circular describes the eligibility criteria and procedures for administering the Minnesota State Incentive Programs effective from 1 July 2009 through 30 June 2010, unless sooner rescinded or amended.

1-2. REFERENCES.

- (1) Minnesota Statute 192.501, Financial Incentives for National Guard members.
- (2) Minnesota Statute 190.03, Laws to Conform to United States Regulations
- (3) Department of Defense Financial Management Regulation.

1-3. PURPOSE.

a. The purposes of the State Incentive Programs are to:

(1) Encourage the recruitment of qualified prior and non-prior service members for the Minnesota National Guard

(2) Encourage members currently assigned to the Inactive National Guard (ING) or Individual Ready Reserve (IRR) to re-affiliate with the Minnesota National Guard.

(3) Encourage current Minnesota National Guard members to extend their enlistment agreements.

(4) Improve the qualifications of Minnesota National Guard members through higher education.

(5) Reward eligible Minnesota National Guard members for their willingness to serve the needs of the State of Minnesota at the order of the Governor and the President of the United States in support of world-wide operational requirements.

b. The purpose of this circular is to establish policy to administer the State Incentive Programs.

1-4. 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 Battalion.** The Recruiting and Retention Battalion is responsible to promote recruiting and retention through the incentives offered by the Minnesota State Incentive Program.

d. **State Incentives Committee.** The State Incentives Committee is responsible for formulating policy contained within this circular. The committee members are as follows:

- (1) Joint Force Headquarters - J1
- (2) Division Chief, Army Personnel
- (3) Division Chief, Air Personnel
- (4) State Command Sergeant Major
- (5) State Resource Management Representative

- (6) 34th Infantry Division Representative
- (7) 84th Troop Command Representative
- (8) 347th Regional Support Group Representative
- (9) 133rd Airlift Wing Representative
- (10) 148th Fighter Wing Representative
- (11) Army Recruiting and Retention Manager
- (12) Air Recruiting and Retention Superintendent
- (13) Education Services Officer
- (14) Education Section Chief
- (15) State Incentives Program Administrator, Recorder

e. **National Guard Commanders.** Commanders at all levels are responsible for keeping members of their commands informed of the State Incentive Programs and continuing to monitor eligibility of those members who are receiving state incentives.

f. **National Guard Members.** National Guard Members are responsible to apply for the incentives for which they are eligible according to the policies within this circular.

1-5. **FUNDING.** The funding available for the State Incentive Programs is limited by the appropriations set by the State Legislature. These programs will continue as long as funds are available.

1-6. **STATE FISCAL YEAR.** The state fiscal year begins on 1 July 09 and ends on 30 June 10.

1-7. **SATISFACTORY PARTICIPANT.** A satisfactory participant of the Minnesota National Guard is defined as a member who meets the following criteria.

- a. Is an active drilling member of his/her unit of assignment or attachment.
- b. Has no period of absent without leave (AWOL)/unsatisfactory participation within the last 12 months.
- c. Has no more than four (4) periods of excused absence within the last 12 months.
- d. Is currently deployable as per criteria required for his/her current duty position, or if not, is making diligent and measurable progress toward becoming deployable.
- e. Is not under suspension of favorable actions (Army) or adverse administrative actions (Air) IAW applicable regulation and policy.

1-8. **RECOUPMENT.**

a. Funds paid under the State Incentive Programs may be recouped from those individuals who fail to serve satisfactorily in the Minnesota National Guard, as defined by the Adjutant General in paragraph 1-7. Further details regarding recoupment procedures are explained in the sections describing each program.

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 contracts due to the following conditions:

- (1) Unit inactivation, relocation, or reduction in force (reorganization).
- (2) Interstate transfer to another National Guard unit.

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

1-9. **EXCEPTIONS TO POLICY.** When extenuating circumstances exist, a request for exception to policy may be initiated by the member in writing and submitted through his/her chain of command to the Education Services Office, JFMN-J1-ARED. The request must clearly explain the circumstances that may merit an exception to policy.

CHAPTER 2**MINNESOTA STATE TUITION REIMBURSEMENT PROGRAM**

2-1. **GENERAL.** The State of Minnesota sponsors the State Tuition Reimbursement Grant 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.

2-2. **ELIGIBILITY.** The State Tuition Reimbursement program is available to the following individuals, in addition to those covered under Chapter 3:

a. Current members of the Minnesota National Guard who:

(1) Are serving satisfactorily as defined by the Adjutant General in paragraph 1-7; and

(2) Have successfully completed Basic Training (BT), Basic Military Training (BMT) or ROTC Leadership Training Course; and

(3) Are between the ranks of E-1 through O-5 (to include Warrant Officers). Officers promoted to the grade of O6 during the school term are eligible to use the State Tuition Reimbursement Program until the end of that term.

b. Former members of the Minnesota National Guard who:

(1) Have satisfactorily completed their service contracts in the Minnesota National Guard or the portions of it involving selective reserve status, for which any part of that service was spent serving honorably in federal active service (Title 10 orders) or federally funded state active duty since September 11, 2001. In these cases, the person's eligibility is extended for a period of two years (2), plus an amount of time equal to the duration of that person's active service. Eligibility effective date is 4 June 2005.

(2) Have served honorably in the Minnesota National Guard and have been separated or discharged due to a service-connected injury, disease, or disability. In these cases, the person's eligibility is extended for eight (8) years beyond the date of separation. Eligibility effective date is 4 June 2005.

2-3. **RATE OF REIMBURSEMENT.** The Minnesota National Guard will reimburse up to 100% of the tuition charged for eligible coursework (undergraduate and graduate) at accredited post-secondary institutions, not to exceed 100% of the University of Minnesota Twin Cities campus rate for school year 2009-2010.

2-4. COURSE REQUIREMENTS.

a. Reimbursement is authorized for:

(1) Courses taken at an accredited post secondary educational institution or certification program approved for veteran's benefits.

(2) Courses eligible for placement on a transcript from the post secondary educational institution.

(3) Undergraduate courses completed with a grade of "C" or higher.

(4) Graduate courses completed with a grade of "B" or higher.

(5) Courses a student is currently attending at the time of enlistment into the MNNG.

(6) Courses which end prior to the service members End of Term of Service (ETS) date; unless the service member qualifies under paragraph 2-2 b.

b. Reimbursement is not authorized for:

(1) Courses that were not completed.

(2) Courses that earn Continuing Education Units (CEUs).

(3) Activity fees, computer user fees, registration fees, books, room and board expenses, and other school-related fees.

c. If a student 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.

2-5. MAXIMUM LIFETIME BENEFIT. The maximum lifetime benefit under the State Tuition Reimbursement Program is funding for 208 quarter/144 semester credits.

2-6. ADMINISTRATION.

a. *Tuition reimbursement is paid upon successful completion of coursework.*

b. A member must request tuition reimbursement no later than 90 days from the last official day of the term.

c. The student's final fee statement dated after course completion and provided by the institution 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. The final fee statement must include all other benefits paid directly to the institution, or are pending payment, on the student's behalf (i.e. FTA/ACES TA, GI BILL, ROTC scholarship).

2-7. ADDITIONAL SOURCES OF FUNDING.

a. Members of the Minnesota National Guard may use the State Tuition Reimbursement Program in conjunction with federally funded programs. Members receiving Federal Benefits which pay tuition benefits directly to the institution are eligible to receive funds under the State Tuition Reimbursement program; however, the combination of Federal Benefits and State Tuition Reimbursement cannot exceed 100% of the tuition cost or the State Tuition Reimbursement maximum credit hour benefit, whichever is less.

b. Tuition reimbursement grants received under this subdivision may not be considered by the Minnesota Higher Education Services Office or by any other state board, commission, or entity in determining a person's eligibility for a scholarship or grant-in-aid.

2-8. APPLICATION PROCEDURES.

a. Service Member's Responsibilities.

(1) Read and sign the Memorandum of Understanding (MOU) (Annex A-1) annually. This memorandum specifically outlines the member's responsibility for obtaining reimbursement under the State Tuition Reimbursement Program.

(a) Review the MN National Guard Circular 621-5-1-A (Annex A-1) annually and sign a new MOU.

(b) Submit the signed MOU to his/her unit. Do not forward directly to the Education Service Office. Units will maintain the MOU, and will verify in the State Tuition Reimbursement Database that the service member has signed the current MOU with each payment request. MOU must be available for inspection upon request by the Education Service Officer.

(c) Complete an Annual Obligation Request (Annex A-2). Service members must submit the completed Annual Obligation Request form to the unit within 45 days of their course start date. Units must enter the obligation into the automated system. Failure to obligate within 45 days of their course start date will result in non-payment. Service members who enlist into the MN National Guard during a school term must submit the Annual Obligation Request prior to requesting payment. 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 2009 through Summer Session I 2010.

(2) The service member must submit a tuition reimbursement Payment Request (Annex A-3). 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 no later than 90 days from the last official day of the term. See paragraph 2-9 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-A (See Annex A-3).

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

(c) Final fee statement that clearly shows the amount of tuition charged and must be dated after course completion and provided by the institution. 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 a point of contact at the institution. The final fee statement must include all other federal benefits which pay tuition costs directly to the institution, or pending payment, on the student's behalf (i.e. FTA/ACES TA, GI BILL, ROTC scholarship).

(d) State payments are now made via direct deposit using Minnesota Direct Deposit Authorization for EFT.

b. Unit Responsibilities.

(1) Execute 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, but must be furnished upon request by the Education Services Officer.

(2) Ensure all Soldiers and Airmen request for tuition reimbursement annually. Soldiers and Airmen who have not obligated within 45 days of their course start date 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 no later than 90 days from the last day of the school term. Prior to submitting, the unit must complete the following:

(a) Perform a quality review to ensure that the information is complete and that the member has submitted a final fee statement clearly showing the amount of tuition charged, the payment request form containing the amount of Federal Benefits which pay tuition costs directly to institution, and the grade report.

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

(c) Verify that the service member is in good standing IAW paragraph 1-7. If the service member is not in good standing, return request to the service member without action.

(d) Attach payment request form, final fee statement and grade report into the system.

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

c. ESO Responsibilities.

(1) The ESO allocates funds according to the Annual Obligation Requests received.

(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/ROTC Leadership Training Course until notification that the training is complete. Process for payment upon notification of completion.

(4) Deny payment on Requests for Reimbursement that arrived at the ESO in excess of 90 days after the last official day of the school term.

(5) Deny payment on requests that do not contain final fee statements, incomplete payment request forms, or incomplete grade reports.

2-9. INCOMPLETE COURSEWORK AND LATE REQUESTS.

a. Incomplete Coursework.

(1) If the student has an incomplete course, the unit should still request payment for other completed classes for that term. Once the student has finished the incomplete class(es), unit should request payment for those courses (specify which classes submitting for). Students must submit reimbursement requests for completed courses no later than 90 days from the last official day of the term; the ESO will reimburse for these courses provided annual obligation was submitted and funds are available.

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

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

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

(2). Upon completion of the coursework, complete a new MN-NG Form 621-5-2-A (Annex A-3), Payment Request, 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 student misses the 90-day suspense, the obligation will be terminated. No reimbursement request will be approved for that term. (For extenuating circumstances, the service member must submit an exception to policy in accordance with paragraph 1-9.)

2-10. **TERMINATION.** The submission of a falsified grade report, transcript or final fee statement, or an 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.

2-11. **TUITION REIMBURSEMENT OPTION FOR SPOUSES.**

a. Service members who meet the following criteria may opt to have their Spouse use a portion of the remaining balance of their State Tuition Reimbursement Grant.

(1) Are serving satisfactorily as defined by the Adjutant General in paragraph 1-7; and

(2) Have served at least 8 years of [active-drilling, non-ING] service in the Minnesota National Guard

(3) Are between the ranks of E-1 through O-5 (to include Warrant Officers). Spouses of Officers promoted to the grade of O6 during the school term are eligible to use the State Tuition and Textbook Reimbursement Program until the end of that term.

b. Annual Cap. Spouses may use up to 12 semester/17 quarter credits annually, not to exceed the sponsoring Service member's lifetime benefit of 144 semester/208 quarter credits.

c. Payment Procedures will remain the same as for the Service member, and all payments will be direct deposited into the sponsoring Service member's bank account.

CHAPTER 3
TUITION REIMBURSEMENT - SURVIVOR ENTITLEMENT

3-1. **GENERAL.** 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 service member'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 between the service member's home of record and place of duty for drill attendance. Deaths from natural causes or suicide are excluded from this benefit.

3-3. **ELIGIBILITY.**

- a. The surviving spouse is eligible regardless of remarriage.
- b. Surviving dependents are eligible until their 24th birthday.
- c. Surviving spouse and eligible dependent(s) will remain eligible even if they move out of state and become a non-Minnesota resident.

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; and if no spouse, to the oldest adult dependent; or the guardian of minor children. The letter will indicate by name, date of birth, social security number, and 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. **RATE OF REIMBURSEMENT.** The Minnesota National Guard will reimburse up to 100% of the tuition charged for eligible coursework (undergraduate and graduate) at accredited post-secondary institutions, not to exceed 100% of the University of Minnesota Twin Cities campus rate for school year 2009-2010.

b. **COURSE REQUIREMENTS.**

(1) Reimbursement is authorized for:

- (a) Courses taken at an accredited post secondary educational institution or certification program approved for veteran's benefits.
- (b) Courses eligible for placement on a transcript from the post secondary educational institution.
- (c) Undergraduate courses completed with a grade of "C" or higher.
- (d) Graduate courses completed with a grade of "B" or higher.

(2) Reimbursement is not authorized for:

- (a) Courses that were not completed.

(b) Courses that earn Continuing Education Units (CEUs).

(c) Activity fees, computer user fees, registration fees, books, room and board expenses, and other school-related fees.

(3) If a student 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.

c. **MAXIMUM LIFETIME BENEFIT.** The maximum lifetime benefit under the State Tuition Reimbursement Program is funding for 208 quarter/144 semester credits.

d. **ADMINISTRATION.**

(1) Tuition reimbursement is paid upon successful completion of coursework.

(2) A student must request tuition reimbursement no later than 90 days from the last official day of the term.

(3) The student'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 student must obtain a letter from the institution that states the amount of tuition charged and a point of contact at the institution.

3-6. PAYMENT PROCEDURES.

a. "Memorandum of Understanding" (Annex A-1).

(1) This memorandum specifically outlines the student's responsibility for obtaining reimbursement under the Minnesota State Tuition 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, Contact ESO for applicable form) 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 2009 through Summer Session I 2010.

c. Request for Reimbursement.

(1) Student must submit the following forms and supporting documents to the ESO within 90 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) Final 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 has an incomplete, he/she should still request payment for other completed classes for that term. Once the student has finished the incomplete class (es), he/she should request payment for those courses (specify which classes submitting for). Students must submit reimbursement requests for completed courses no later than 90 days from the last official day of the term; the ESO will reimburse for these courses provided annual obligation was submitted and funds are available.

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

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

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

(2) Upon completion of the coursework, complete a new MN-NG Form 621-5-2-R-E (Annex A-3), 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 student misses the 90-day suspense, the obligation will be terminated. No reimbursement request will be approved for that term. (For extenuating circumstances, the student must submit an exception to policy in accordance with paragraph 1-9.)

3-8. TERMINATION.

- a. The submission of a falsified grade report, transcript or final fee statement, or an 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.
- 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.

CHAPTER 4**MEDICAL AND DENTAL TUITION REIMBURSEMENT**

4-1. **GENERAL.** To encourage physicians, dentists, and physician assistants to accept a commission in the Minnesota National Guard upon completion of graduate medical training.

4-2. **ELIGIBILITY.** Army officers appointed as medical students and Air Guard officers attending medical school are eligible for this program. The number of participants enrolled in the program cannot exceed 21 Soldiers or Airmen. Yearly allocations will be 14 medical or dental students and 3 physician assistant students for Army and 3 medical or dental students and 1 physician assistant student for Air. Coordination is encouraged between services to ensure all available allocations are utilized. Participation in this program does not prohibit participation in the Specialized Training Assistance program (STRAP) or Health Professional Loan Repayment program (HPLRP).

4-3. **RATE OF REIMBURSEMENT.** This program pays tuition reimbursement for medical and dental students, not to exceed 100% of the tuition costs at the University of Minnesota, Medical School, Twin Cities campus rate for school year 2009-2010.

4-4. **ROLE OF ARMY AMEDD RECRUITER AND ANG 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.**

(1) "Memorandum of Understanding." Obtain the MOU from the AMMED Recruiter or the unit 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 Recruiter or unit Retention Manager annually.

b. Annual Obligation Request.

(1) Complete an Annual Obligation Request (Annex A-2). Service members must submit the completed Annual Obligation Request form to the AMEDD Recruiter or unit of assignment within 45 days of their course start date. AMEDD Recruiter or unit must enter the obligation into the automated system. Failure to obligate within 45 days of their course start date will result in non-payment.

(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 2009 through Summer Session I 2010.

c. Requests for Reimbursement.

(1) The officer must submit the following forms and supporting documents to the AMEDD Recruiter, ANG Retention Manager or unit full-time staff in sufficient time for the reimbursement request to arrive at the ESO no later than 90 days from the last official day of the term.

(a) Payment Request, ESO Form 621-5-2-A (Annex A-3).

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

(c) Final fee statement that clearly shows the amount of tuition charged and must be dated after course completion and provided by the institution. 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 a point of contact at the institution. The final fee statement must include all other federal benefits which pay tuition costs directly to the institution, or pending payment, on the student's behalf (i.e. FTA/ACES TA, GI BILL, ROTC scholarship).

(d) State payments are now made via direct deposit using Minnesota Direct Deposit Authorization for EFT.

(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) If a service member misses the 90-day suspense, the obligation will be terminated. No reimbursement request will be approved for that term. (For extenuating circumstances, the service member must submit an exception to policy in accordance with paragraph 1-9.)

4-6. INCOMPLETE COURSEWORK AND LATE REQUESTS.

a. Incomplete Coursework.

(1) If the service member has an incomplete course, the Army AMEDD Recruiter or ANG Retention Manager should still request payment for other completed classes for that term. Once the service member has finished the incomplete class (es), Army AMEDD Recruiter or ANG Retention Manager should request payment for those courses (specify which classes submitting for). Service member must submit reimbursement requests for completed courses no later than 90 days from the last official day of the term; the ESO will reimburse for these courses provided annual obligation was submitted and funds are available.

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

(b) Service member must submit request for reimbursement, along with fee statement and grades to the unit.

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

(2). Upon completion of the coursework, complete a new MN-NG Form 621-5-2-A (Annex A-3), Payment Request, 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 student misses the 90-day suspense, the obligation will be terminated. No reimbursement request will be approved for that term. (For extenuating circumstances, the service member must submit an exception to policy in accordance with paragraph 1-9.)

4-7. SERVICE OBLIGATION AND RECOURPMENT.

a. The service obligation for Medical Officers begins upon completion of residency and will run concurrently with all other service obligations. Medical Officers will incur a two year service obligation for each year of reimbursement under the provisions of this chapter. (Individuals who received Medical Tuition Reimbursement prior to 1 July 2009 will retain their original service obligation in accordance with the policy in effect at that time.)

b. The service obligation for Dental Officers and Physician Assistants will begin upon completion of graduate school and will run concurrently with all other service obligations. Participants will incur a two year service obligation for each year of reimbursement under the provisions of this chapter. (Individuals who received Medical/Dental Tuition Reimbursement prior to 1 July 2009 will retain their original service obligation in accordance with the policy in effect at that time.

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

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

e. The ESO will recoup a prorated amount of the total amount reimbursed if the officer does not fulfill his/her contracted service obligation.

CHAPTER 5**STATE COMMISSIONING BONUS**

5-1. **GENERAL.** The Adjutant General has authorized a \$1,000 bonus upon initial commissioning/appointment for Soldiers in the Minnesota Army National Guard. 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.

5-2. **ELIGIBILITY.** Soldiers who are commissioned or appointed as a warrant officer 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. Airmen who are commissioned through the Commissioned Officer Training School (COTS), Medical Officer Training School (MOTS), or the Reserve Commissioned Officer School (RCOTS) are eligible for the commissioning bonus. Soldiers and Airmen who started their commissioning/appointment course or were commissioned/appointed prior to 1 July 2009 will receive the bonus in accordance with the circular for that fiscal year. Fulltime members of the Minnesota National Guard are eligible for the State Commissioning Bonus.

5-3. 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. State payments are now made via direct deposit using Minnesota Direct Deposit Authorization for EFT.

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 (education@mn.ngb.army.mil) so the officer can be processed for payment. State payments are now made via direct deposit using Minnesota Direct Deposit Authorization for EFT.

5-4. **TAXES.** Taxes are not withheld from the payment. The bonus recipient is responsible to report this payment as income when he/she completes individual Federal and State tax returns.

5-5. **RECOUPMENT.** All commissioning bonuses are contingent upon the soldier's/Airman's commencing training at the appropriate Officer Basic Course (OBC), Warrant Officer Basic Course (WOBC) or for airmen their appropriate commissioning program within 12 months of commissioning, per NGR 600-100, NGR 600-101 and ANGI 36-2005, with the exception of those soldiers/airman holding an approved OBC/WOBC extension request prior to commissioning date. Should the soldier/airman fail to begin the required OBC/WOBC per NGR 600-100/NGR 600-101, ANGI 36-2005, or in accordance with the provisions of an approved extension, the entire bonus will be recouped immediately.

CHAPTER 6

STATE REENLISTMENT BONUS

6-1. **GENERAL.** The Adjutant General has authorized a \$1,000 State Reenlistment bonus per year (with a maximum of \$5,000) for Soldiers and Airmen in the Minnesota National Guard.

6-2. **ELIGIBILITY.** Soldiers and Airmen who have completed six (6) years of service towards their initial eight (8) year service obligation and who have twelve (12) or fewer years of service creditable for retirement as indicated on NGB Form 23B or ANG PCARS form are eligible for this bonus.

- a. Meet Minnesota National Guard reenlistment eligibility criteria.
- b. Be qualified in and hold as primary the MOS/AFSC to which they are assigned and hold the rank and grade of, or no more than one grade below, the required grade of the position.
- c. Must have been a satisfactory participant during the 3 months prior to the date of their reenlistment.
- d. Reenlist for three or six years.
- e. Service members that receive a federal reenlistment bonus for the amount less than the state reenlistment bonus (in this case, the state will pay the state maximum bonus amount minus their federal bonus eligible amount).
- f. Service members that do not receive a federal reenlistment bonus
- g. Permanent fulltime members of the Minnesota National Guard (AGR and Technicians) are NOT eligible for the State Reenlistment Bonus.

6-3. PAYMENT PROCEDURES.

a. Initial payment of \$1000 will be made the day after the date of Expiration of Term of Service (ETS) and additional payments of up to \$1000 will be made once a year during the service member's anniversary month until the \$5000 per member limit is met. The service member is required to complete a state direct deposit form as all bonus payments will be paid via direct deposit.

(1) Army National Guard: The Unit Retention Manager is responsible for forwarding the Reenlistment Bonus Addendum (Annex B-1) and a completed State of Minnesota direct deposit form to the Education Services Office so the member's payment can be processed.

(2) Air National Guard: The Base Retention Manager is responsible for forwarding the Reenlistment Bonus Addendum (Annex B-1) and a completed State of Minnesota direct deposit form to the Education Services Office so the member's payment can be processed.

b. Accountability. The ESO monitors payments made and tracks future payments.

6-4. **TAXES.** Taxes are not withheld from the payment. The bonus recipient is responsible to report this payment as income when completing federal and state tax returns.

6-5. TERMINATION WITH RECOUPMENT.

- a. Bonus will be terminated & recouped if the service member:
 - (1) Becomes an unsatisfactory participant by—

(a) Accumulating four (4) unexcused absences within a 12-month period. Recoupment will take effect on the date of the 4th unexcused absence; or—

(b) Failing to attend or complete Annual Training (AT) without Commander approval. Recoupment will take effect on the first day of annual training.

(c) Is not deployable as per criteria required for his/her current duty position, and, is not making diligent progress toward becoming deployable. Recoupment will take effect on the date of the non-deployability.

(d) Is under suspension of favorable actions (Army) or adverse administrative actions (Air) IAW applicable regulation and policy. Recoupment will take effect on the date of suspension of favorable actions.

(2) Fails to extend enlistment for time served in the ING within 30 days after return to unit. Recoupment is required from the effective date of transfer to the ING.

(3) Exceed maximum time in the ING (one year). Recoupment is required from the date of transfer into the ING.

(4) Separates from the Minnesota National Guard and enters active duty in a U.S. Armed service. Recoupment is required from date of separation.

(5) Separates from the Minnesota National Guard for any reason (*recoupment is required from date of separation*) unless due to death, injury, illness, or other impairment not the result of own misconduct.

b. Recoupment amount will be determined by multiplying the number of months served satisfactorily during the term for which the bonus was authorized by the proportionate monthly dollar amount. This amount is determined by dividing the total authorized bonus amount by 12 months. The amount of the bonus the service member is entitled to retain will be subtracted from the total bonus paid to date. If calculations indicate an overpayment that amount will be recouped. If calculations indicate that service member has earned more than he/she has received, he/she will be paid the difference in a final installment.

c. Death. Service members who die before receiving the full amount of the bonus due will have their bonus settled following the same criteria as federal incentives.

d. Recoupment Matrix.

EVENT	RECOUP	RECOUP FROM
Unsatisfactory Participant.	Yes	Date of 4 th AWOL
Unsatisfactory Participant for AT.	Yes	1 st day of AT
Fails to extend for time spent in ING.	Yes	Date transferred to ING
Exceeds maximum time in ING.	Yes	Date transferred to ING
Non-MOSQ w/ 24 months of voluntary transfer.	Yes	Date of transfer
Separate from MNNG to Active Army.	Yes	Date of separation
Separate from MNNG for any reason.	Yes – See exceptions	Date of separation

6-6. **UNIT RESPONSIBILITIES.** Unit Retention Manager needs to notify the Education Services Office (ESO) immediately upon the following:

a. Service Member becoming an unsatisfactory participant by—

(1) Accumulating four (4) unexcused absences within a 12-month period. Need to send forward date of the 4th unexcused absence; or—

(2) Failing to attend or complete Annual Training (AT) without Commander approval. Need to send forward the date of the first day of annual training.

b. Fails to extend enlistment for time served in the ING within 30 days after return to unit. Need to send forward the effective date of transfer to the ING.

c. Exceed maximum time in the ING (one year). Need to send forward the date of transfer into the ING.

d. Separates from the Minnesota National Guard and enter active duty in a U.S. Armed service. Need to send forward the date of separation.

e. Separates from the Minnesota National Guard for any reason unless due to death, injury, illness, or other impairment not the result of own misconduct. Unit needs to send forward the date of separation.

6-7. TERMINATION WITHOUT RECOUPMENT. Reenlistment bonus will be terminated without recoupment upon commissioning/appointment into the Minnesota Army National Guard.

CHAPTER 7**MEDIC RECERTIFICATION BONUS PROGRAM**

7-1. **GENERAL.** The Adjutant General has authorized a \$1,000 bonus every two years for the purposes of National Guard Medic recertification as a qualified EMT-B.

7-2. **ELIGIBILITY.** The Medic Recertification Bonus is authorized for current members of the Minnesota National Guard who:

- a. Are serving satisfactorily as defined by the Adjutant General in paragraph 1-7; and
- b. Have successfully completed Basic Training (BT) or Basic Military Training (BMT); and
- c. Have successfully completed a Medic MOS or AFSC producing advanced training; and
- d. Are currently serving in an authorized duty position that requires EMT-B certification (i.e. ARNG 68W's; and
- e. Have a current National Registry of Emergency Medical Technicians (NREMT) card.
- f. Agree to serve for a period of two years starting the day after completion of EMT-B recertification course.

7-3. PAYMENT PROCEDURES.

- a. Service member completes EMT-B refresher course and turns in certificate of completion to unit clerk.
- b. Service member provides copy of current National Registry of Emergency Medical Technicians (NREMT) card to unit clerk.
- c. Unit clerk has Service member sign Statement of Understanding and attaches certificate of completion, NREMT card and emails documents to Education@mn.ngb.army.mil as request for payment.
- d. State payments are now made via direct deposit using Minnesota Direct Deposit Authorization for EFT.

7-4. **TAXES.** Taxes are not withheld from the payment. The bonus recipient is responsible to report this payment as income when completing federal and state tax returns.

7-5. TERMINATION WITH RECOUPMENT.

- a. Bonus will be recouped if the service member:
 - (1) Becomes an unsatisfactory participant by—
 - (a) Accumulating four (4) unexcused absences within a 12-month period. Recoupment will take effect on the date of the 4th unexcused absence; or—
 - (b) Failing to attend or complete Annual Training (AT) without Commander approval. Recoupment will take effect on the first day of annual training.
 - (c) Is not deployable as per criteria required for his/her current duty position, and, is not making diligent progress toward becoming deployable. Recoupment will take effect on the date of the non-deployability.

(d) Is under suspension of favorable actions (Army) or adverse administrative actions (Air) IAW applicable regulation and policy. Recoupment will take effect on the date of suspension of favorable actions.

(2) Fails to extend enlistment for time served in the ING within 30 days after return to unit. Recoupment is required from the effective date of transfer to the ING.

(3) Exceed maximum time in the ING (one year). Recoupment is required from the date of transfer into the ING.

(4) Separates from the Minnesota National Guard and enter active duty in a U.S. Armed service. Recoupment is required from date of separation.

(5) Separates from the Minnesota National Guard for any reason (*recoupment is required from date of separation*) unless due to death, injury, illness, or other impairment not the result of own misconduct. Service members who die before receiving the full amount of the bonus due will have their bonus settled following the same criteria as federal incentives.

b. Recoupment amount will be determined by multiplying the number of months served satisfactorily during the term for which the bonus was authorized by the proportionate monthly dollar amount. This amount is determined by dividing the total authorized bonus amount by 12 months. The amount of the bonus the service member is entitled to retain will be subtracted from the total bonus paid to date. If calculations indicate an overpayment that amount will be recouped. If calculations indicate that service member has earned more than he/she has received, he/she will be paid the difference in a final installment.

7-6. **UNIT RESPONSIBILITIES.** Unit Retention Manager needs to notify the Education Services Office (ESO) immediately upon the following:

a. Service Member becoming an unsatisfactory participant by—

(3) Accumulating four (4) unexcused absences within a 12-month period. Need to send forward date of the 4th unexcused absence; or—

(4) Failing to attend or complete Annual Training (AT) without Commander approval. Need to send forward the date of the first day of annual training.

f. Fails to extend enlistment for time served in the ING within 30 days after return to unit. Need to send forward the effective date of transfer to the ING.

g. Exceed maximum time in the ING (one year). Need to send forward the date of transfer into the ING.

h. Separates from the Minnesota National Guard and enter active duty in a U.S. Armed service. Need to send forward the date of separation.

i. Separates from the Minnesota National Guard for any reason unless due to death, injury, illness, or other impairment not the result of own misconduct. Need to send forward the date of separation.

7-7. **TERMINATION WITHOUT RECOUPMENT.** Medic Recertification bonus will be terminated without recoupment upon commissioning/appointment into the Minnesota Army National Guard.

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-ED, 20 West 12th Street, St. Paul, MN 55155-2098.

FOR THE ADJUTANT GENERAL:

KEVIN S. GERDES
COL, GS, MNARNG
J1 Manpower & Personnel

OFFICIAL:
LESTER
ESO

DISTRIBUTION:
A (Army)
F (Air)

**MINNESOTA STATE TUITION REIMBURSEMENT PROGRAM
MEMORANDUM OF UNDERSTANDING FALL 09-SUMMER 10**

A-1. ACKNOWLEDGEMENT STATEMENT.

I, _____ (Full Name, Rank), certify that I have read this memorandum prior to signing and fully understand the policies and procedures of the Minnesota State Tuition Reimbursement (STR) 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 all the criteria outlined in Minnesota National Guard Circular 621-5-1, dated 1 Jul 09, I may jeopardize my entitlement to receive reimbursement.

c. I understand that the STR Program will reimburse up to 100% of tuition, not to exceed 100% of the University of Minnesota Twin Cities campus, undergraduate tuition rate. That rate is currently \$326.92 per credit, with a maximum of \$4250.00 per term for school year 2009-2010. (final rates undetermined at time of publication).

d. I understand that NGB policy states that soldier's can use Federal Tuition Assistance (FTA)/ACES TA and STR in conjunction with each other provided that the total combined amount of benefits paid does not exceed 100% of actual tuition/fees costs.

e. I UNDERSTAND THAT IF I RECEIVE FEDERAL BENEFITS WHICH PAY TUITION BENEFITS DIRECTLY TO THE INSTITUTION, THE COMBINATION OF FEDERAL BENEFITS AND STR CANNOT EXCEED 100% OF THE TUITION COST OR THE STR MAXIMUM CREDIT HOUR BENEFIT, WHICHEVER IS LESS. (To include, but not limited to, FTA, CH 33 GI Bill, ROTC Scholarship, etc.)

f. I understand that reimbursement is not authorized for activity fees, computer user fees, registration fees, books, room and board expenses, and other school-related fees.

A-3. CRITERIA FOR PARTICIPATION.

a. I understand that in order 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 Basic Training (BT), Basic Military Training (BMT), or ROTC Leadership Course.

(3) I must maintain active 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 of that term upon completion of basic training, provided all other criteria are met.

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) within the last 12 months while participating in the program.

(2) I can have no more than four (4) periods of Excused Absence during the last 12 months.

(3) I am currently deployable as per criteria required for my current duty position, or if not, I am making diligent progress toward becoming deployable.

(4) I am not under suspension of favorable actions (Army) or adverse administrative actions (Air) IAW applicable regulation and policy.

c. I understand the following additional requirements:

(1) I, or my spouse, 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 lifetime benefit that I may receive under this program is equivalent to 208 quarter/144 semester credits.

(3) To use the Tuition Reimbursement option for Spouses, I must have served at least 8 years of [active-drilling, non-ING] service in the Minnesota National Guard

(4) Courses which end after my End of Term of Service (ETS) date are not eligible for payment, unless I qualify under the Extended Eligibility rules.

d. I understand that I, or my spouse, must complete coursework in accordance with the following guidelines:

(1) Undergraduate Study. I, or my spouse, 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, or my spouse, "withdraw" or receive a grade of "C-" or lower.

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

e. I understand that I will be eligible for reimbursement for the course upon completion, and if the grade requirements outlined above are met.

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-A, (Annual Obligation Request) and submit it to my unit prior within 45 days of the course start date. 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. I understand that failure to obligate within 45 days of the course start date will result in non-payment.

(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 2009 through Summer Session I 2010.

c. Request for Reimbursement Payment:

(1) I understand that I must submit the following forms and supporting documents to my unit in sufficient time for them to arrive at the ESO within 90 days after the last official day of the term. 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. One submission each for Fall, Winter, Spring, Summer and Summer 2 terms.

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

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

(c) Final fee statement dated after course completion and provided by the institution 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. The final fee statement must include all other benefits paid directly to the institution, or pending payment, on the service member's behalf (i.e. FTA/ACES TA, GI BILL, ROTC scholarship).

(d) Direct deposit form – State payments are now made via direct deposit using Minnesota Direct Deposit Authorization for EFT.

(2) I understand that my signature on the MN-NG Form 621-5-2-A 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 90 days after the last official day of the course.

(a) I understand that if I fail to meet this suspense, I am not eligible for reimbursement.

A-5 INCOMPLETE COURSEWORK AND LATE REQUESTS.

a. Incomplete Coursework.

(1) I understand that if I have an incomplete, that I should still request payment for other completed classes for that term. Once I have finished the incomplete class (es), I should request payment for those courses (specifying which classes submitting for). I must submit reimbursement requests for completed courses no later than 90 days from the last official day of the term; the ESO will reimburse for these courses provided annual obligation was submitted and funds are available.

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

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

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

(2) I understand that upon completion of the coursework, complete a new MN-NG Form 621-5-2-A, 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 student misses the 90-day suspense, the obligation will be terminated. No reimbursement request will be approved for that term. (For extenuating circumstances, the service member must submit an exception to policy in accordance with paragraph 1-9.)

A-5 **TERMINATION.** I understand that the submission of a falsified grade report, transcript or fee statement, or an 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

A-6. **OTHER 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 not be considered for payment.

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

Date

Signature of Unit Rep.

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

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

AUTHORITY: Minnesota Statute 192.501 Financial Incentives for National Guard Members

PRINCIPLE PURPOSE: To explain obligation and participation requirements for State Reimbursement Program and to ensure that your agreement to these conditions is a matter of record.

ROUTINE USES: To confirm requirements of obligation and participation requirements for the State Reimbursement Program, occasionally as a basis for suspension, termination and recoupment if requirements are not met.

DISCLOSURE: Disclosure of your SSN is voluntary; however, if not provided, you will not be eligible for the State Reenlistment Bonus Program.

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

Spouse Option? (Y/N) _____ Spouse Name (if using Spouse option): _____

Current Mailing Address: _____

City: _____ State: _____ Zip Code: _____

Phone Number: _____ Email Address: _____

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

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

Unit Phone Number: _____ Unit Email Address: _____

Course Type: Vo/Tech _____ Undergraduate _____ Graduate _____ Dist Learning _____ Independent Study _____

School Year: _____ School Attending: _____

Anticipated Service Member Credits by Term: Fall _____ Winter _____ Spring _____
Summer1 _____ Summer2 _____

Anticipates Spouse Credits by Term: Fall _____ Winter _____ Spring _____ Summer1 _____ Summer2 _____

Have you completed basic training, basic military training, or ROTC Leadership Course? Yes No
If no, what is the estimated completion date of training? _____

Have you previously submitted a Minnesota Direct Deposit Authorization for EFT? Yes No
If no, then submit a MN Direct Deposit form with this request.

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 90 days of the last day of the term.

SIGNATURE

DATE

MINNESOTA NATIONAL GUARD
STATE TUITION REIMBURSEMENT PROGRAM
PAYMENT REQUEST

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

AUTHORITY: Minnesota Statute 192.501 Financial Incentives for National Guard Members

PRINCIPLE PURPOSE: To explain obligation and participation requirements for State Reimbursement Program and to ensure that your agreement to these conditions is a matter of record.

ROUTINE USES: To confirm requirements of obligation and participation requirements for the State Reimbursement Program, occasionally as a basis for suspension, termination and recoupment if requirements are not met.

INSTRUCTIONS: Complete this form, attach grade report and final fee statement dated after course completion and provided by the institution and submit to your unit. The form must arrive at the ESO within 90 days after the last official day of the term. Payment requests submitted after 90 days will be returned to the unit without action.

Name: _____ SSN: _____

Spouse Option? (Y/N) _____ Spouse Name (if using Spouse option): _____

Current Mailing Address: _____ City: _____ State: _____

Zip Code: _____ Email Address: _____ Telephone: _____

Unit: _____

School Year _____ School Attended _____

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

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

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, basic military training, or ROTC Leadership Course? Yes No
If no, what is the estimated completion date of training? _____

My Minnesota Direct Deposit Authorization for EFT form is currently on file or attached. _____ (initial)

Did you receive GI Bill Benefits which directly paid tuition costs to the institution? Yes No
If YES, what was the amount \$ _____

Did you receive Federal Tuition Assistance or ACES Tuition Assistance? Yes No
If YES, what was the amount \$ _____

Did you receive an ROTC Scholarship which directly paid tuition costs to the institution Yes No
If YES, what was the amount \$ _____

FAILURE TO REPORT THE ABOVE AWARDED AMOUNTS WILL RESULT IN TERMINATION FROM THE STATE TUITION REIMBURSEMENT PROGRAM, AND RECOUPMENT OF FUNDS.

I verify that the address and information on this form is correct. The documentation I have submitted, herewith, is true and correct. I understand that failure to report Federal Benefits which directly pay tuition costs to the institution will result in termination from the State Tuition Reimbursement program for a period of one year, and recoupment of funds.

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, basic military training, or ROTC Leadership Training.
- The service member has no more than four excused absences within the last 12 months.
- The service member has no unexcused absences within the last 12 months.
- The service member is currently deployable as per criteria required for his/her current duty position, or if not, is making diligent progress toward becoming deployable.
- The service member is not under suspension of favorable actions IAW applicable regulation and policy.

Printed name of Unit Administrator
Date
Unit Phone #

**REENLISTMENT BONUS ADDENDUM
MINNESOTA NATIONAL GUARD**

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

- 7-1. **AUTHORITY:** Minnesota Statute 192.501 Financial Incentives for National Guard Members
- 7-2. **PRINCIPLE PURPOSE:** To explain obligation and participation requirements for State Reenlistment Bonus and to ensure that your agreement to these conditions is a matter of record.
- 7-3. **ROUTINE USES:** To confirm requirements of obligation and participation requirements for the State Reenlistment Bonus, occasionally as a basis for suspension, termination and recoument if requirements are not met.
- 7-4. **DISCLOSURE:** Disclosure of your SSN is voluntary; however, if not provided, you will not be eligible for the State Reenlistment Bonus.

7-5. **GENERAL:** The reenlisting official will explain the bonus requirements. One copy will be attached to the DD Form 4/DA Form 4836 and listed as Annex C and a copy will be given to the soldier.

7-6. **ELIGIBILITY:** Upon my reenlistment in the Army or Air National Guard of the United States I am eligible for a Reenlistment Bonus under the State Reenlistment Bonus program if I meet the following criteria: *(Initial as appropriate item c or d):*

- a. I am qualified in and hold as primary the MOS/AFSC to which I am assigned and hold the rank and grade of, or am no more than one grade below, the required grade of the position.
- b. I have been a satisfactory participant during the 3 months prior to the date of my reenlistment.
- c. I am not receiving a Federal Reenlistment/Extension Bonus for an amount greater than the State Reenlistment Bonus.

d. I have completed my initial 6 years of service towards my 8 year service obligation and I have 12 or fewer years of service creditable for retirement at current Expiration Term of Service (ETS) and I am re-enlisting for 3 years within 1 year prior, or 24 hours after, completion of my current ETS. _____ (Initial). (or)

e. I have completed my initial 6 years of service towards my 8 year service obligation and I have 12 or fewer years of service creditable for retirement at current Expiration Term of Service (ETS) and I am re-enlisting for 6 years within 1 year prior, or 24 hours after, completion of my current ETS. _____ (Initial).

7-7. **BONUS AMOUNT and PAYMENTS:** Incentive amount and payments will be as follows *(Initial as appropriate item 1 or 2)*. *(This is based on the MN National Guard Circular 621-5-1 in effect at the time of Reenlistment):*

- a. I will receive a bonus of \$3,000 for a 3-year reenlistment or \$5,000 for a 6-year reenlistment as indicated below.

1. _____ For a 3 year reenlistment I will receive a total bonus of \$3,000. The first \$1,000 payment will be processed on the date that my reenlistment contract takes effect (1 day after current ETS). Additional payments of \$1,000 will be paid once a year during my anniversary month. If I am eligible to receive a 3 year Federal Reenlistment Bonus, the total amount of the 3 yr Federal Reenlistment

Bonus will be deducted from the \$3000 State Reenlistment Bonus. I am only eligible to receive the difference of the amount.

2. _____ For a 6 year reenlistment I will receive a total bonus of \$5,000. The first \$1,000 payment will be processed on the date that my reenlistment contract takes effect (1 day after current ETS). Additional payments of \$1,000 will be paid once a year during my anniversary month until the \$5,000 limit is met. If I am eligible to receive a 6 year Federal Reenlistment Bonus, the total amount of the 6 yr Federal Reenlistment Bonus will be deducted from the \$5000. I am only eligible to receive the difference of the amount.

b. I understand that I will not receive payment if I do not meet the eligibility outlined in paragraph 7-6 of this document at the time my reenlistment takes effect. My reenlistment will be verified and certified by the proper authority prior to any payment being processed.

c. State payments are now made via direct deposit using Minnesota Direct Deposit Authorization for EFT. If my form is not already on file with the State Department of Finance, I will attach a current authorization.

7-8. **SUSPENSION:** I understand I will be suspended from bonus eligibility if I (*Initial as appropriate item b or c*):

a. Enter a period of non-availability (*placement in the Inactive National Guard (ING)*). Maximum periods of non-availability are:

- (1) 1 year for personal reasons.
- (2) 3 years for missionary obligations.

b. Am flagged (IAW applicable regulation and policy) for an adverse action. _____.(Initials)

c. Do not meet the standards set forth by the Air National Guard Fitness Program as referenced in ANGI 40-501 or did not satisfactorily participate as referenced in AFI 36-3208. _____.(Initials)

I further understand reinstatement of bonus eligibility is not guaranteed. Provided I meet all requirements for participation, payments are processed effective on the date the suspension is lifted or on the adjusted anniversary date of satisfactory creditable service.

7-9. **RECOUPMENT:** I understand I will be terminated from bonus eligibility with recoupment if I:

a. Become an unsatisfactory participant by—

(1) Accumulating four unexcused absences within a 12-month period. Recoupment will take effect on the date of the 4th unexcused absence; or—

(2) (Fail to attend or complete Annual Training (AT) without Commander approval. Recoupment will take effect on the first day of annual training.

b. Fail to extend my enlistment for time served in the ING within 30 days after return to my unit. Recoupment is required from the effective date of transfer to the ING.

c. Exceed maximum time in the ING (one year). Recoupment is required from the date of transfer into the ING.

d. Separate from the Minnesota National Guard and enter active duty in a U.S. Armed service. Recoupment is required.

e. Separate from the Minnesota National Guard for any reason (*recoupment is required*) unless due to death, injury, illness, or other impairment not the result of my own misconduct.

f. The ESO will recoup a prorated amount of the bonus if the service member does not fulfill their contracted service obligation.

7-10. **STATEMENT OF UNDERSTANDING:** I have read this addendum in its entirety. I understand all of the above statements concerning my reenlistment bonus. I understand that this addendum will be void if I do not meet all of the requirements. No other promises have been made to me in connection with this reenlistment bonus addendum of signature.

Date Signed Signature of soldier or Airman

Typed or Printed Name SSN of soldier or Airman

Typed or Printed Address of Soldier or Airmen

VERIFICATION BY SERVICE REPRESENTATIVE:

Unit/Address/Phone Number Date of signature

Typed/Printed Name/Rank of Enlisting Official Signature of Enlisting Official

----- FOR ESO USE ONLY -----

Contract was verified by State Program Manager for accuracy.

Printed name and Signature of program manager Date
(Must be reviewed by program manager prior to payment.)

**STATEMENT OF UNDERSTANDING
MEDIC RECERTIFICATION BONUS
MINNESOTA NATIONAL GUARD**

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

7-1. **AUTHORITY:** Minnesota Statute 192.501 Financial Incentives for National Guard Members

7-2. **PRINCIPLE PURPOSE:** To explain obligation and participation requirements for State Medic Recertification Bonus and to ensure that your agreement to these conditions is a matter of record.

7-3. **ROUTINE USES:** To confirm requirements of obligation and participation requirements for the State Medic Recertification Bonus, occasionally as a basis for suspension, termination and recoupment if requirements are not met.

7-4. **DISCLOSURE:** Disclosure of your SSN is voluntary; however, if not provided, you will not be eligible for the State Medic Recertification Bonus.

7-5. **ELIGIBILITY:** Upon my completion of the EMT-B Recertification Course I am eligible for a Medic Recertification Bonus under the State Medic Recertification Bonus program if I meet the following criteria:

a. I am qualified in and hold 68W as my primary MOS, and I am assigned to a valid 68W duty position and hold the rank and grade of, or am no more than one grade below, the required grade of the position.

b. I agree to serve for a period of 2 years beginning the day after completion of the EMT-B recertification course.

c. I have a current National Registry of Emergency Medical Technicians (NREMT) card.

d. I have been a satisfactory participant during the 3 months prior to the date of my reenlistment.

7-6. **BONUS AMOUNT and PAYMENT:** Incentive amount and payment will be as follows:

e. I will receive a bonus of \$1,000 for a 2-year service obligation as an EMT-B qualified 68W.

f. I understand that I will not receive payment if I do not meet the eligibility outlined in paragraph 7-5 of this ANNEX at the time my service obligation takes effect. My completion of training will be verified and certified by the proper authority prior to any payment being processed.

g. State payments are now made via direct deposit using Minnesota Direct Deposit Authorization for EFT.

7-8. **SUSPENSION:** I understand I will be suspended from bonus eligibility if I:

a. Enter a period of non-availability (*placement in the Inactive National Guard (ING)*). Maximum periods of non-availability are:

(1) 1 year for personal reasons.

(2) 3 years for missionary obligations.

b. Am flagged (IAW applicable regulation and policy) for an adverse action. _____.(Initials)

c. Do not meet the standards set forth by the Air National Guard Fitness Program as referenced in ANGI 40-501 or did not satisfactorily participate as referenced in AFI 36-3208. _____.(Initials)

d. Allow my NREMT licensure to expire, I understand that I am not eligible to receive the Medic bonus for the first period following NREMT re-licensure. _____. (Initials)

I further understand reinstatement of bonus eligibility is not guaranteed. Provided I meet all requirements for participation, payments are processed effective on the date the suspension is lifted or on the adjusted anniversary date of satisfactory creditable service.

7-9. **RECOUPMENT:** I understand I will be terminated from bonus eligibility with recoupment if I:

f. Become an unsatisfactory participant by—

(1) Accumulating four unexcused absences within a 12-month period. Recoupment will take effect on the date of the 4th unexcused absence; or—

(2) (Fail to attend or complete Annual Training (AT) without Commander approval. Recoupment will take effect on the first day of annual training.

g. Fail to extend my enlistment for time served in the ING within 30 days after return to my unit. Recoupment is required from the effective date of transfer to the ING.

h. Exceed maximum time in the ING (one year). Recoupment is required from the date of transfer into the ING.

i. Separate from the Minnesota National Guard and enter active duty in a U.S. Armed service. Recoupment is required.

j. Separate from the Minnesota National Guard for any reason (*recoupment is required*) unless due to death, injury, illness, or other impairment not the result of my own misconduct.

f. The ESO will recoup a prorated amount of the bonus if the service member does not fulfill their contracted service obligation.

7-10. **STATEMENT OF UNDERSTANDING:** I have read this addendum in its entirety. I understand all of the above statements concerning my medic recertification bonus. I understand that this addendum will be void if I do not meet all of the requirements. No other promises have been made to me in connection with this reenlistment bonus addendum of signature.

Date Signed Signature of soldier or Airman

Typed or Printed Name SSN of soldier or Airman

Typed or Printed Address of Soldier or Airmen

VERIFICATION BY SERVICE REPRESENTATIVE:

Unit/Address/Phone Number Date of signature

Typed/Printed Name/Rank of Unit Representative

Signature of Unit Representative

----- FOR ESO USE ONLY -----

Contract was verified by State Program Manager for accuracy.

Printed name and Signature of program manager

Date

(Must be reviewed by program manager prior to payment.)