



Federal Tuition Assistance (FTA) Policy Changes



What Changed?

- ★ The updated FTA policy introduces a tier system, eliminates the one-year wait after AIT/BOLC, and rescinds the 10-year service requirement to use FTA for a master's degree.
- ★ Soldiers must complete Advanced Leaders Course (ALC), Captain Career Course (CCC), or Warrant Officer Advanced Course (WOAC) to use FTA for a master's degree (*if FTA was used toward any portion of undergraduate degree).

IMPORTANT! These changes become effective on 5 August 2018!

What are Tiers?

Tier 1:

Soldiers establish Tier 1 FTA eligibility as follows:

- Have not attained a bachelor's degree and wish to pursue an undergraduate academic certificate, associate's or bachelor's degree or
- Have attained a bachelor's degree and wish to pursue a *graduate* academic certificate or
- Have attained a bachelor's degree without the use of FTA and wish to pursue a master's degree.
- Must complete Advanced Individual Training, Warrant Officer Basic Course, or Basic Officer Leaders Course.

Tier 2:

***Soldiers establish Tier 2 FTA eligibility as follows:**

- Have attained a bachelor's degree with the use of FTA and wish to pursue a master's degree
- Must complete Advanced Leaders Course, Captain Career Course, Warrant Officer Advanced Course or equivalent.

Note: Soldiers must meet all eligibility requirements to qualify for FTA; visit goarmyed.com to setup your FTA account today.



SECRETARY OF THE ARMY
WASHINGTON

06 JUN 2018

MEMORANDUM FOR SEE DISTRIBUTION

SUBJECT: Army Directive 2018-09 (Army Tuition Assistance Policy)

1. References:

- a. Department of Defense Directive 1322.08E (Voluntary Education Programs for Military Personnel), January 3, 2005, Certified Current as of April 23, 2007.
- b. Department of Defense Instruction 1322.25 (Voluntary Education Programs), 15 March 2011, Incorporating Change 3, Effective July, 7 2014.
- c. Army Regulation (AR) 40-501 (Standards of Medical Fitness), 14 June 2017.
- d. AR 600-8-2 (Suspension of Favorable Personnel Actions (Flag)), 11 May 2016.
- e. AR 621-1 (Training of Military Personnel at Civilian Institutions), 28 August 2007.
- f. AR 621-5 (Army Continuing Education System), 11 July 2006, Including Rapid Action Revision Issued 6 September 2009.
- g. Memorandum, SAMR, 20 May 2015, subject: Army Tuition Assistance Policy Changes (hereby rescinded).

2. Purpose. This directive revises the Army tuition assistance (TA) policy.

3. Applicability. This policy applies to the Regular Army and members of the Army National Guard/Army National Guard of the United States (ARNG/ARNGUS) and U.S. Army Reserve (USAR) serving in the Selected Reserve.

4. Effective Date. The effective date is 60 days from the date of this directive.

5. Tiered Eligibility. Depending on their current level of post-secondary education, Soldiers may be eligible for up to two tiers of TA:

- a. Tier 1: Soldiers who have not attained a bachelor's degree and wish to pursue an undergraduate certificate/diploma, or associate or bachelor's degree; or who have previously attained a bachelor's degree without the use of TA and who wish to pursue a graduate certificate/diploma or master's degree.

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b. Tier 2: Soldiers who previously used TA for any portion of their undergraduate degree, have attained a bachelor's degree, and wish to pursue a graduate certificate/diploma or master's degree.

6. Soldiers establish tier 1 TA eligibility as follows:

- a. Enlisted Soldiers who have graduated Advanced Individual Training.
- b. Warrant officers who have graduated Warrant Officer Basic Course.
- c. Officers who have graduated Basic Officer Leaders Course.

7. Soldiers establish tier 2 TA eligibility for pursuit of a master's degree (when any portion of their undergraduate degree was funded with TA) as follows:

- a. Enlisted Soldiers who have successfully completed Advanced Leaders Course.
- b. Warrant officers who have graduated Warrant Officer Advanced Course.
- c. Officers who have graduated Captain Career Course or equivalent.

8. Baseline Eligibility Requirements. Regardless of which TA tier they are eligible for, all Soldiers must meet the following eligibility requirements to receive TA benefits:

- a. Soldiers must not be under suspension of favorable personnel actions in accordance with AR 600-8-2.
- b. Soldiers must not be a contracted Reserve Officers Training Corps (ROTC) scholarship cadet or Green-to-Gold ROTC program cadet.
- c. Soldiers must have sufficient time in service remaining to complete all courses for which the Soldier is requesting TA.
- d. Soldiers must resolve any GoArmyEd-imposed account holds, including, but not limited to, unsuccessful, incomplete, or missing class grades; minimum grade point average; incorrect civilian education level; missing/unapproved degree plan; expired or missing statement of understanding; and semester hour (SH) and annual and lifetime TA limits.
- e. Soldiers must not be attending school under the provisions of AR 621-1 (such as fully funded schooling or degree completion or cooperative degree programs) during the period the Soldier is requesting TA.

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f. Soldiers in Active Guard and Reserve status, pursuant to titles 10 or 32, and ARNG/ARNGUS and USAR Soldiers in an active drilling status must have a designation of satisfactory participant.

9. Tuition Assistance Program Authorizations. If Soldiers meet the eligibility requirements in paragraphs 5 through 8, they may participate in the TA program subject to the following:

a. Soldiers may take up to 16 SH each fiscal year at the rate of up to \$250 a SH each year.

b. Soldiers may use TA to pursue postsecondary education at the following levels: certificate/diploma, associate, bachelor's, and master's.

c. Soldiers may only use TA to pursue one degree/certificate at a time.

d. Soldiers may not use TA for courses leading to a lower or lateral postsecondary diploma/degree than they already possess, regardless of funding source used, except for special programs identified in AR 621-5 with approval of an Army Education Counselor.

e. Soldiers may use TA to earn one or more degrees through the master's level for a combined total of up to 130 SH at the undergraduate level (associate and bachelor's), 39 SH for a master's degree, and 21 SH for an academic certificate/diploma (undergraduate or graduate level).

f. TA is not authorized for doctor's degrees as defined by the U.S. Department of Education. Examples include, but are not limited to, Doctor of Jurisprudence or Juris Doctor (J.D.), Doctor of Medicine (M.D), Doctor of Pharmacy (Pharm.D), and Doctor of Philosophy (Ph.D.).

g. TA is not authorized for courses available in Army e-Learning unless the class is required as part of the official degree plan.

h. TA is not authorized for institutional challenge examinations/credit-by-examination, credit awarded based solely on an assessment of prior learning and/or experience, portfolio evaluation, or review of military or civilian transcript(s).

i. This policy change does not affect existing authorized uses of TA not explicitly prohibited by this directive.

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j. TA covers tuition only. TA will not pay for fees institutions levy, unless authorized by DoD Instruction 1322.25.

k. TA is not authorized for any course for which a Soldier receives reimbursement in whole or in part from any other Federal source, including veterans' education benefits and Service-funded programs (ROTC scholarship, education-related incentive or bonus, and advanced civil schooling) when the TA payment would constitute a duplication of benefits. Federal student aid loan, grant, and work-study programs are not considered a duplication of benefit.

10. The Deputy Chief of Staff, G-1 is the proponent for this policy and will incorporate the provisions of this directive into the next update of AR 621-5. The Deputy Chief of Staff, G-1 will publish implementing guidance and annual updates to the TA program's policies and procedures. Direct any questions about the policy to U.S. Army Human Resources Command, Army Continuing Education Division at usarmy.knox.hrc.mbx.tagd-aces@mail.mil.

11. This directive is rescinded upon publication of the revised AR 621-5.



Mark T. Esper

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INFORMATION PAPER

AHRC-PDE
14 June 2018

SUBJECT: Frequently Asked Questions - Tuition Assistance (TA) Policy Revision

1. Purpose: To assist Army Continuing Education System (ACES) personnel in implementing and applying Army Directive 2018-09 (Army Tuition Assistance Policy) dated 6 June 2018, and U.S. Army Human Resources Command Memorandum, Subject: Tuition Assistance Implementation Guidance (TBP).

2. Frequently Asked Questions:

Q1: When does the revised TA policy become effective?

A1: This policy applies to all TA Requests submitted in GoArmyEd on or after 5 August 2018.

Q2: Why is the Army making these changes?

A2: Due to the varying lengths of AIT schools depending on the MOS, this revised policy eliminates any perception of unfairness that the one-year wait after AIT required for Soldiers with longer AITs. The policy also permits Soldiers to start working toward an associate degree, bachelor's degree, master's degree, or certificate/diploma earlier during their military career.

Q3: Does the revised TA policy change any of the TA benefits?

A3: No. TA allocations remain unchanged. Currently, Soldiers may use up to 16 semester hours (SH) per fiscal year at a maximum rate of \$250 per SH. Soldiers may use TA for up to 130 SH for baccalaureate degree completion, 39 SH for a master's degree, and up to 21 SH for a diploma/certificate.

Q4: How and when will Soldiers be notified of these changes?

A4: HQ ACES is notifying Soldiers through a variety of media and methods, including targeted broadcast messaging through GoArmyEd, a forthcoming MILPER message, press releases through Army Public Affairs Offices, and installation education center/office local efforts. The strategic communications effort commenced shortly after the policy letter was signed. Soldiers will also acknowledge the revised TA policy by signing a new TA Statement of Understanding quarterly.

Q5: Will Soldiers currently using TA be "grandfathered" under current TA policy?

A5: No. Soldiers with approved TA Requests prior to 5 August 2018 and those currently enrolled will be able to finish those classes but all Soldiers will be required to meet the new TA standards when implemented on Sunday, 5 August 2018.

Q6: If a prior service Soldier completed military education level (MEL) training qualifying for Tier 1 or Tier 2 level TA previously, and then that Soldier reenlists

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or becomes an officer, does that Soldier have to complete the new MEL training based on his/her new paygrade or career status? For example, if a Soldier completes ALC while enlisted, and then that Soldier becomes a warrant officer or commissioned officer, does that Soldier now have to complete the officer advanced course (WOAC or CCC) to meet Tier 2 eligibility?

A6: No. For MEL purposes, the Soldier's education during periods of prior military service counts. This applies to both Tier 1 and Tier 2 education requirements.

Q7: What impact does the Army anticipate this change may have on the number of Soldiers who use TA?

A7: We expect these changes will increase the use of TA. Eliminating the 1-year wait for new users will permit Soldiers to begin using TA sooner, thereby allowing Soldiers more time to take advantage of TA benefits during their Army service. Additionally, Soldiers who use TA for their undergraduate degree will also be able to use TA earlier toward a master's degree because the majority of Soldiers will complete their advanced professional military education (PME) well before their 10th year of service, which was the previous requirement.

Q8: How many Soldiers will be affected by this new policy?

A8: Based on Army statistics, we estimate that up to 12,000 more Soldiers per year will take advantage of TA benefits.

Q9: Some Soldiers, particularly in the Reserve Component, are unable to attend advanced military education training due to the lack of training seat availability. Will these Soldiers be able to obtain a waiver or exception to policy (ETP) so they can use TA?

A9: No, there is no provision in the revised policy to grant exceptions to the MEL eligibility criteria due to lack of training seat availability.

Q10: Some military training courses did not exist or had different titles at the time a Soldier completed the course. How will this affect these Soldiers' TA eligibility?

A10: These Soldiers will not be affected. Soldiers who attended training courses with different names or titles will automatically be coded in GoArmyEd as having completed the equivalent current MEL requirement.

Q11: Some MOSs, such as 79R (Army Recruiter), and officer branches, such as JAG and Army Band, do not have an advanced course such as ALC or CCC. How will this affect the Soldier's TA eligibility?

A11: Soldiers in MOSs or branches that do not have a formal AIT or advanced course will receive constructive/equivalency credit based on completion of the training specified for their MOS/branch. This logic applies to all Soldiers, enlisted, commissioned, and warrant officers whose unique career path may prescribe alternate training/education.

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In these cases, the Soldier or Army education counselor should submit a GoArmyEd helpdesk case.

Q12: Due to MOS end-strength caps Soldiers in some MOSs may not have the same opportunity for promotion as others and therefore may be disadvantaged because they may not be able to meet Tier 2 MEL standards. This is especially a concern among the Reserve Components. How will this new policy address this?

A12: There is no provision in the new policy to grant exceptions to MEL criteria based on MOS or career field promotion rates.

Q13: How will MEL eligibility be determined for Soldiers who came into the Army with a civilian skill and as a result were not required to attend AIT?

A13: Soldiers who did not have to attend AIT will establish Tier 1 eligibility standards upon successful completion of BCT (as verified by the education counselor from the Soldier's JST or DA Form 1059).

Q14: What step(s) should an Army education counselor take if a Soldier states that he or she has completed the appropriate MEL training, but it is not reflected in GoArmyEd?

A14: Counselors should ask Soldiers to provide a copy of their Joint Service Transcript (JST). If the JST substantiates that the Soldier has completed the appropriate training/course, the counselor may grant a one-time deferral (up to 90 days).

Alternatively, or if the JST does not reflect the training, then the Soldier may upload a copy of the DA Form 1059, verifying the Soldier completed the training, permitting the counselor to defer the hold for up to 90 days. In either case, the counselor should instruct the Soldier to report this discrepancy to his or her S1/PAC to ensure the Soldier's record is corrected, as this is a one-time deferral.

Q15: I heard that Soldiers would be required to be deployable and complete Structured Self Development (SSD) training to be eligible for TA. Is this still the case?

A15: No. Deployability and SSD training are not a factor in determining a Soldier's eligibility to use TA.

Q16: Will the TA Statement of Understanding (SOU) be updated to reflect the policy changes?

A16: Yes, the current SOU (dated Sep 2015) is under revision and we anticipate will be ready for signature not later than 5 August 2018.

Q17: Will the Army publish an ALARACT or MILPER announcing the new TA policy changes?

A17: Yes, the Army will be publishing an update to ALARACT 049/2016.

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Q18: I read in Army Times that the revised version of AR 621-5 is due for release 60 days from now. Is that correct?

A18: No. In citing the Army Directive (AD) implementing the TA policy change, it appears the Army Times article confused the statement in the AD that the policy change will take effect 60 days from the date of the AD (6 June 2018), and that these changes would be reflected in the revision to AR 621-5. The release date for the revision to AR 621-5 will be more than 60 days from the TA policy implementation date of 5 Aug 2018.

Q19: Currently, TA Requests that Soldiers submit less than five business days prior to the class start date and do not get approved before the class start date are ineligible for ETP, regardless of the reason the TA Request was not approved. Does this rule still apply?

A19: Yes, TA Requests submitted less than five business days prior to the class start date if not approved prior to the class start date, are not eligible for ETP consideration regardless of reason.

Q20: Army Directive 2018-09 makes no mention of additional military service obligations (ADSO or RDSO) for commissioned officers who elect to use TA. Has this changed?

A20: No, additional military service obligations that commissioned officers incur are imposed by law (Title 10 USC, Sec 2007) and therefore remain unchanged.

Q21: Some Soldiers who are currently using TA will become ineligible when the revised policy takes effect on 5 Aug 18. Would it be appropriate for Army education counselors to encourage these Soldiers to request TA now for the fall term if within 60 days of the class start date?

A21: Yes. Counselors may encourage TA-eligible Soldiers to enroll in classes included in their official degree plan as soon as the TA window opens for approved classes.

Q22: From which military personnel automated systems does the MEL code derive? Is this still eMILPO for the enlisted active duty, TOPMIS for active duty officers, RLAS for USAR Soldiers, and SIDPERS for ARNG Soldiers? We need to know what system to direct Soldiers to have their unit S1 update to ensure the feed goes to GoArmyEd.

A22: Because tracking Soldiers' education level is "S1 business," the best response is simply to advise the Soldier to contact his/her S1 or personnel office.

Q23: How long will it take for the automatic data feed to update a Soldier's MEL status in GoArmyEd? Can Army education counselors defer this hold with proof of course completion while waiting for the military systems to update GoArmyEd?

A23: GoArmyEd refreshes nightly, however it could take as long as four weeks for GoArmyEd to receive the feed. Counselors will be able to grant a one-time deferral (up

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to 90 days) if the Soldier uploads a copy of the JST or DA Form 1059 to verify the Soldier completed the requisite MEL training.

Q24: According to the revised TA policy can a Soldier who already has a bachelor's, master's, or doctoral degree use TA for an undergraduate level diploma or certificate?

A24: Yes. Soldiers who are eligible for TA may use up to 21 SH toward a graduate or undergraduate diploma/certificate, regardless of present civilian education level, provided they have not earned a certificate in the previous five years. However, Soldiers desiring to pursue a diploma or certificate must submit a degree plan and receive Army education counselor approval prior to commencing the program.

Q25: Is there any provision to allow Soldiers who have not attained Tier 2 MEL standards to use TA towards a master's degree if they are attending an Army PME school and participating in a cooperative degree program between the PME school and civilian educational institution?

A25: Soldiers (officer or enlisted) who are enrolled in a resident PME course that has an established formal partnership or articulation agreement between the PME proponent school and an EI may submit a helpdesk case requesting an ETP for the Tier 2 MEL completion requirement. Soldiers must upload to GoArmyEd a memorandum from their PME school adviser or registrar verifying their participation in the partnership program before the hold can be deferred.

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