

U.S. Department
of Transportation

United States
Coast Guard



Commandant
United States Coast Guard

2100 Second Street, SW
Washington, DC 20593-0001
Staff Symbol: G-WTR-1
Phone: (202) 267-0629

COMDTINST 1001.30E
MAY 21 1999

COMMANDANT INSTRUCTION 1001.30E

Subj: MONTGOMERY GI BILL - SELECTED RESERVE EDUCATIONAL ASSISTANCE
PROGRAM

Ref: (a) Reserve Policy Manual, COMDTINST M1001.28
(b) DoD Instruction 1322.17
(c) Title 10, USC Chapter 1606

1. PURPOSE. This Instruction publishes the eligibility criteria, recoupment process and establishes the administration procedures for the Montgomery GI Bill - Selected Reserve (MGIB-SR) Educational Assistance Program, Chapter 1606 of Title 10, U.S. Code.
2. ACTION. Area and district commanders, commanders of maintenance and logistics commands, commanding officers of headquarters units, assistant commandants for directorates, Chief Counsel, and special staff offices at Headquarters shall comply with the provisions of this instruction.
3. DIRECTIVES AFFECTED. Montgomery GI Bill - Selected Reserve Educational Assistance Program, COMDTINST 1001.30D is canceled.
4. BACKGROUND. The MGIB Selected Reserve Educational Assistance Program was originally established for a 3 year trial period by Public Law 98-525, the "Veterans Educational Assistance Act of 1984." The program was subsequently made permanent by Public Law 100-48, "The New GI Bill Continuation Act." In October of 1990, Public Law 101-189 expanded benefits to include all programs available to active duty veterans except postgraduate study. Both laws apply only to members of the Selected Reserve (SELRES), and to those who are eligible to have their remaining SELRES commitment waived under reference (b). Effective 1 April 1993, Public Law 102.568, "The Veterans Benefits Act," established the requirement of an annual increase of the MGIB-SR benefits. The benefits increased October 1998 from \$208 to \$251 per month. On 30 November 1993, Public Law 103-160 authorized educational assistance for programs beyond the baccalaureate level for post-baccalaureate training received after 30 November 1993 only. The program's goal is to

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encourage and sustain membership in the SELRES. It is administered through the Department of Veterans Affairs (VA).

5. OBJECTIVES. This program was designed to:

- a. Provide the benefits of a higher education to personnel who might not otherwise be able to afford this education;
- b. Assist in recruiting highly qualified personnel into the Reserve Components of the Armed Forces;
- c. and Enhance our Nation's competitiveness through the development of more highly educated and productive citizens.

6. DISCUSSION. Enclosure (1) describes eligibility and termination criteria and the benefits available through the program. Enclosure (2) applies to SELRES eligibility for vocational/technical training courses and additional baccalaureate degree programs available after 01 October 1990. Enclosure (3) is the Statement of Understanding (SOU) (CG-5482). Enclosure (4) is a sample of the Notice of Basic Eligibility or (NOBE) (DD Form 2384-1). The law requires that a NOBE be issued to every member of the SELRES at the time they fulfill all the requirements to participate in the MGIB-SR Educational Assistance program. Members are provided a photocopy of their completed NOBE to use when applying for benefits. Enclosure (5) provides guidance to members applying for benefits. Enclosure (6) describes the MGIB-SR recoupment process. Enclosure (7) provides an overview of how the MGIB-SR eligibility is established. Enclosure (8) describes the process to change a status code. Enclosure (9) is an overview of the MGIB-SR payment process to the member.

7. RESPONSIBILITIES.

a. Commandant (G-WTR) will:

- (1) Serve as program manager for the MGIB-SR;
- (2) Publish policy concerning the MGIB-SR Educational Assistance Program;
- (3) Maintain liaison with the VA on the regulations pertaining to the program;
- (4) Maintain liaison with the Office of the Assistance Secretary of Defense for Reserve Affairs and other program managers within the Armed Services to coordinate MGIB policy;

- (5) and Maintain liaison with the Human Resources Service & Information Center (HRSIC) to ensure any necessary program/system changes are appropriately incorporated into PMIS.

- b. Director, Coast Guard Recruiting Center (CGPC-CGRC) will: Ensure that recruiting units processing civilian applicants provide information on the Selected Reserve Educational Assistance Program to prospective Reserve personnel.

- c. Commanding Officer, USCG Training Center Cape May will:
 - (1) Conduct an orientation period on the benefits of the MGIB-SR program within the first 2 weeks of training for RK, RP, RY, and RX members;
 - (2) Ensure eligible members complete the SOU (CG-5482) and NOBE (DD Form 2384-1)
 - (3) Distribute the NOBE and the SOU as follows:
 - (a) Original forwarded to the individual's servicing Personnel Reporting Unit (PERSRU) for filing in the member's PERSRU PDR; (b) A copy placed in the member's unit record; and
 - (b) A copy to be retained by member for use in applying for MGIB benefits.
 - (4) Ensure Personnel Action (CG-3312A) establishing eligibility date upon member's graduation, is prepared in SDAII and successfully transmitted to PMIS/JUMPS.

- d. Unit Commanding Officers will designate unit ESO to:
 - (1) Educate reservists regarding the MGIB program;
 - (2) Ensure eligible members complete SOU and NOBE if one was not completed at USCG Training Center Cape May;
 - (3) Forward original SOU and NOBE to servicing Personnel Reporting Unit, copy to CGPC-adm-3 and copy to member;
 - (4) File copies of the NOBE and SOU in the member's unit record;
 - (5) Designate a unit representative to assist members in resolving problems they experience in applying for benefits; and

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- (6) Promptly notify servicing PERSRU of members whose eligibility should be terminated as per paragraph 5 of enclosure (1) to this Instruction. Documentation of timely counseling of unsatisfactory performers must be made.
- e. Servicing PERSRUs will:
- (1) Ensure CG-3312A (transaction code P230) entries are made in PMIS establishing eligibility for those members who have not previously established eligibility during initial training. A member must have at least 6 years obligated SELRES service remaining in order to participate in the MGIB-SR. Officers must submit a completed CG-5482 as evidence of a 6-year obligation;
 - (2) Distribute the NOBE and SOU as follows:
 - (a) Retain the signed originals in the member's PDR;
 - (b) Forward a copy to CGPC-adm-3 for inclusion in the member's HQ's record.
 - (3) Ensure Personnel Action (CG-3312A) entries are made in PMIS for all subsequent changes in eligibility status for all members;
- f. Eligible members must:
- (1) Apply to the VA for benefits after receiving a copy of their completed NOBE. Application is generally made through the tuition assistance office where they attend school. The application will be forwarded to the Regional Department of Veterans Affairs office along with confirmation of enrollment. Application may be made directly to the VA, but the school must still provide confirmation of enrollment; and
 - (2) Immediately contact their unit if the VA denies them GI Bill benefits, which they believe they are entitled to receive.
8. POINT OF CONTACT. Questions should be directed to the unit Education Services Officer, district, or Commander (CGPC-rpm) by telephone at (202) 267-0544, or 1-800-283-8724.

9. FORMS AVAILABILITY. CG-5482 (Rev. 6-98) may be obtained from SWIII, Forms Filler or locally reproduced. DD Form 2384-1 is a controlled document and may be ordered through the United States Navy by using: Stock Number 0102-LF-002-3841, Unit of Description (U/D): 50 sheet, Unit of Issue (U/I): PD and the Stockpoint: Navy.

T. J. BARRETT
Director of Reserve and Training

- Encl: (1) Selected Reserve Educational Assistance Program
(2) October 1990 VOTECH Changes
(3) Statement of Understanding (CG-5482)
(4) Samples Notice of Basic Eligibility (DD Form 2384-1)
(5) Member Application Guidelines
(6) Failure to Participate Satisfactory and Recoupment Guidelines
(7) Flowchart - Process on how MGIB-SR eligibility is established
(8) Flowchart - Coding process to change MGIB-SR
(9) Flowchart - MGIB-SR payment process

MONTGOMERY GI BILL - SELECTED RESERVE
EDUCATIONAL ASSISTANCE PROGRAM.

1. ELIGIBILITY CRITERIA. Members of the Selected Reserve (SELRES), who meet the criteria below are eligible for the Montgomery GI Bill (MGIB) Selected Reserve Educational Assistance Program and must be issued a Notice of Basic Eligibility (NOBE) and Statement of Understand (SOU). A NOBE may be issued only once.
 - a. Enlisted Members:
 - (1) After 30 June 1985, must enlist, reenlist, or extend a current enlistment, obligating to serve in the SELRES for a total of 6 years from the date of enlistment, reenlistment, or extension. The date of basic eligibility for members in the RX, RQ, RJ, and RN programs will normally be the date that the obligation for a total of 6 years in the SELRES is incurred.
 - (2) In the RK, RP or RY programs must complete the Initial Active Duty for Training (IADT) required for their specific program. The date of basic eligibility for members in the RK, RP and RY program will normally be the date IADT is complete. RK's normally complete their IADT during two summers.
 - (3) Must receive a high school diploma or an equivalency certificate before finishing IADT. Completion of 12 units of college may be substituted for the high school diploma.
 - (4) Must continue to participate satisfactorily in the SELRES (unless continued SELRES participation is waived under Reserve Transition Benefits (RTB)).
 - (5) In receipt of a financial assistance scholarship through the Senior Reserve Officers Training Corps Program (10 U.S.C. 2107) are not eligible.
 - (6) With a baccalaureate degree can become eligible for benefits if they entered into a new 6-year contract on or after 01 October 1990. A special provision in the law allows ineligible members with baccalaureate degrees, who had signed their last 6-year contract in the SELRES after 30 June 1985, but before 01 October 1990, to be eligible for graduate benefits only after 30 November 1993.

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b. Officers and Warrant Officers:

- (1) After 30 June 1985, must agree to serve in the SELRES for 6 years by signing a SOU. The period of obligated service for the MGIB is in addition to any other period of obligated Selected Reserve service. The date of basic eligibility on the NOBE will normally be the date the SOU is signed.
- (2) Must have a high school diploma, or an equivalency certificate. Completion of 12 units of college may be substituted for the high school diploma.
- (3) Must continue to participate satisfactorily in the SELRES (unless continued SELRES participation is waived under RTB).
- (4) Who receive a financial assistance scholarship through a Senior Reserve Officers Training Corps Program (10 U.S.C. 2107) are not eligible.
- (5) With a baccalaureate degree can become eligible for benefits if they entered into a new 6-year commitment on or after 01 October 1990.

2. BENEFITS.

- a. Effective 01 April 1993, benefits entitlements for Institutions of Higher Learning (IHL) (i.e., colleges and universities) are paid for studies leading to an undergraduate degree, as well as for degrees beyond the baccalaureate level (after 30 November 1993), as follows:
 - (1) \$251.00 per month for full-time study;
 - (2) \$188.00 per month for three-quarter-time study;
 - (3) \$125.00 per month for half-time study; or,
 - (4) \$62.75 per month for less than half time study (may be reduced by VA).
- b. The total benefit of \$9036.00 may be earned through any combination of full, three-quarter, half-time or less than half-time monthly payments. Payments will not be made when school is not attended (e.g., summer break). The payment schedule is based on a 9-month year at the rate of \$251.00 per month for a total of 4 years (36 months). Various programs have payment schedules providing lesser monthly amounts; however, the maximum payment remains \$9036.00 regardless of the payment schedule.
- c. Study must be at an IHL as defined by the Department of Veterans Affairs (VA).

- d. The VA will not pay benefits for graduate level training taken before 30 November 1993.
3. APPLICATION FOR BENEFITS. The VA will administer this program and establish application procedures. The member is responsible for applying for benefits. The member must present a copy of the NOBE (DD Form 2384-1) with signatures in blocks 7.a.(3) and b.(3) to the VA as part of the application.
4. DUPLICATION OF BENEFITS. Members entitled to benefits under this program, who are also eligible for benefits under other Government sponsored educational assistance programs administered by the VA, may not receive benefits under both programs concurrently. Members believing they are entitled under more than one program should contact the VA.
5. TERMINATION. Eligibility for educational assistance shall be terminated when a member:
 - a. Separates from the SELRES;
 - b. Fails to participate satisfactorily in the SELRES;
 - c. Fails to re-affiliate in the SELRES before the expiration of an authorized period of absence;
 - d. Fails to reenlist or extend to restore entitlement upon reaffiliation to equal six years, before the expiration of an authorized period of absence;
 - e. Is discharged from the military service for reasons other than immediate reenlistment, (exception to this are members discharged under RTB);
 - f. Is awarded a Senior Reserve Officer Training Corps scholarship (10 U.S.C. 2107); or;
 - g. Receives a baccalaureate degree or equivalent based on 01 July 1985 requirements. They may, however, establish eligibility for additional benefits under 01 October 1990 criteria by incurring a new 6-year SELRES obligation on or after that date. The 01 July 1985 requirements do not prevent a member who has earned a baccalaureate degree from receiving graduate level assistance.
6. REGAINING ELIGIBILITY AFTER TERMINATION.
 - a. Members who complete a period of satisfactory service and are then released from the SELRES may regain eligibility, if they:

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- (1) Are released for a valid reason such as a period of Active Duty, ADSW-RC, ADSW-AC, or transferred to the IRR for hardship as per chapter 4 of reference (a);
 - (2) Reaffiliate with the SELRES within 1 year or within 3 years for a religious missionary obligation;
 - (3) Are otherwise still eligible for MGIB (SELRES) educational assistance;
 - (4) Have not received entitlement of \$9,036.00.
 - b. Benefit entitlements will be adjusted by the amount previously awarded.
 - c. The required period of service will be adjusted by the amount of satisfactory service previously completed to total 6 years.
 - d. The gaining servicing PERSRU will report the date of basic eligibility from the NOBE filed in the member's official military record.
 - e. Only one voluntary release from the SELRES may be authorized during the 10-year benefit period in order to regain eligibility for benefits.
7. AUTHORIZED ABSENCES. Absences from drills may be excused as per paragraph 2-B-4 of reference (a). Eligibility for benefits will continue during a period of excused absences, but will be terminated if the member does not return to a drilling status when the period of excused absences ends.
8. EXPIRATION. Entitlement to unused Reserve MGIB educational assistance ends on the earlier of the following dates:
- a. The member's 10th anniversary from the Date of Basic Eligibility on their NOBE, if they participated satisfactorily for their entire 6-year obligation and have not otherwise become ineligible for benefits;
 - b. The member's date of separation from the SELRES prior to completing their 6-years of satisfactory service.
9. EXCEPTIONS TO EXPIRATION. The exceptions to the expiration rule are:
- a. Members who are unable to attend school because of a physical or mental disability incurred or aggravated during required SELRES training. Disability must not be due to the member's willful misconduct. Members who want to save eligibility must apply to the VA for an extension on the later of the following dates:

- (1) Within 1-year after the last day of the 10-year period; or,
 - (2) Within 1-year from the last day of their disability.
- b. Members who are enrolled in an educational institution when the period of entitlement expires will have their entitlement extended as follows:
- (1) To the end of the quarter or semester when the member is enrolled in an institution which operates on a quarter or semester basis and the period of entitlement expires during the quarter or semester;
 - (2) To the end of the course, or for 12 weeks, whichever is less, when the member is enrolled in an institution that does not regularly operate on a quarter or semester basis and the period of entitlement expires after a major portion of the course is completed.

MONTGOMERY GI BILL - SELECTED RESERVE (MGIB-SR) - ADDITIONAL PROVISIONS FOR SELECTED RESERVE PERSONNEL INITIALLY APPLYING FOR BENEFITS ON OR AFTER 01 OCTOBER 1990

1. VOCATIONAL/TECHNICAL TRAINING PROGRAMS. Effective 01 October 1990, eligible members of the Selected Reserve were entitled to MGIB benefits for vocational/technical (VOTECH) training courses. The types of training courses included are:
 - a. Apprentice training and other on-the-job training (OJT);
 - b. Cooperative and correspondence courses;
 - c. Refresher, remedial, and deficiency training;
 - d. Tutorial assistance and VA work-study; and
 - e. Flight training as approved by the VA.

2. BENEFITS AND ENTITLEMENTS.
 - a. VOTECH members pursuing an apprenticeship or other OJT are paid as follows:
 - (1) For each of the first 6 months, 75% of the monthly allowance of \$251 for full-time study and lesser amounts for other than full-time;
 - (2) For each of the second 6 months, 55% of the monthly allowance of \$251 for full-time study and lesser amounts for other than full-time; and
 - (3) For each of the months following the first 12 months, 35% of the monthly allowance of \$251 for full-time study and lesser amounts for other than full-time.
 - b. Members pursuing a cooperative program are paid 80% of the monthly allowance of \$251 for full-time study.
 - c. A member who enters an agreement in a VOTECH program exclusively through correspondence, is entitled to 55% of the tuition fee which the institution requires of non-veterans for the same course. Payment will be made quarterly on a pro rata basis for VOTECH correspondence lessons completed by the members and serviced by the educational institution.

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- d. In each of the above cases, the period of entitlement for the member concerned will be charged at 1 month for each \$208 paid to the member as an educational assistance allowance.
- e. For flight training, benefits are paid at a rate of 60% of the approved charges for the course (maximum payment cannot exceed total of \$7,521).

3. ELIGIBILITY CRITERIA.

- a. Members of the SELRES who meet the criteria below are eligible for the MGIB-SR Education Assistance VOTECH Program and must be issued a NOBE:
 - (1) After 01 October 1990, members must enlist, reenlist, or extend their SELRES obligation for a period of 6 years;
 - (2) Members with baccalaureate degrees must reenlist on a new 6 year obligation;
 - (3) Complete the Initial Active Duty Training (IADT) required for their specific program. The date of Basic Eligibility for members in the RK, RP, RX, and RY programs will normally be the date they complete their IADT. For all others, the Basic Eligibility will be the date the 6-year obligation is incurred;
 - (4) Continue to participate satisfactorily in the SELRES;
 - (5) Participate in a program of instruction approved by the Department of Veterans Affairs (VA);
 - (6) Are not receiving a financial assistance scholarship as a member of the Senior Reserve Officers Training Corps Program (10 U.S.C 2107).
- b. Members who are currently participating in a Chapter 1606 program, or who have benefits remaining and wish to change to VOTECH benefits may do so by enlisting, re-enlisting or extending for a total of 6 years in the SELRES in order to meet a new 6 year obligation. For example: if a member has completed 2 years of an original 6 year contract, the member would have 4 years of obligated service remaining. By extending for an additional 2 years on or after 01 October 1990, the member would meet the requirements for the new 6 year obligation and be eligible to participate in the new program.

**STATEMENT OF UNDERSTANDING
MONTGOMERY GI BILL- SELECTED RESERVE**

I, _____ certify that:
(PRINT NAME: LAST, FIRST, MI, AND SSN)

1. Initial one:

- a. _____ I am an enlisted member. I understand that I am obligating myself to 6 years of Selected Reserve Service from my date of enlistment, reenlistment, or extension indicated below. I must also meet the training requirements for the program in which I enlisted. Basic eligibility begins for RK, RP, and RY upon completion of Initial Active Duty for Training (IADT). For all others (including RX) follow the guidance in paragraph 2 below.
- b. _____ I am an officer. I understand that I am obligating myself to serve for 6 years in the Selected Reserve from the date indicated below. This obligation is in addition to any other period of obligated Selected Reserve service. I must also meet the training requirements.

2. Initial each of the following statements:

- a. _____ I have enough obligated service remaining on my enlistment contract for the 6 year Selected Reserve service requirement.
- b. _____ I understand this service obligation satisfies an eligibility requirement for the Montgomery GI Bill (Selected Reserve) Educational Assistance Program (10 U. S. C. 16132 (a)(1)).
- c. _____ I understand that this 6 year Selected Reserve obligation satisfies only one of the eligibility requirements and that I must complete all of the eligibility requirements before I am entitled to benefits.
- d. _____ I understand that if I do not participate satisfactorily in the Selected Reserve, for any part of this obligation, my eligibility will be terminated. I will then be subject to penalty recoupment.

3. My Selected Reserve obligation for the MGIB begins on and will be completed on _____ and will be completed on _____.

Signature of Member

Date

Signature and Title of Witnessing Official

Date

Original:SERVICING PERSRU

Copy: CGPC-adm-3

MEMBER

UNIT PDR

NOTICE OF BASIC ELIGIBILITY (NOBE)			
PRIVACY ACT STATEMENT			
<p>AUTHORITY: 10 U.S.C., Sections 16131 through 16136; E.O. 9397. PRINCIPAL PURPOSE(S): Information will be used to establish entitlement by eligible members of the Selected Reserve to Montgomery GI Bill Educational Assistance benefits. ROUTINE USE(S): To the Department of Veterans Affairs, to substantiate eligibility for educational assistance under the Montgomery GI Bill. DISCLOSURE: Voluntary; however, failure to provide personal information may preclude processing of Notice of Basic Eligibility. COMPUTER MATCHING: Information provided on the Notice of Basic Eligibility is subject to a computer matching agreement between the Department of Defense and the Department of Veterans Affairs. Computer matching is employed to verify an individual's eligibility for and continued compliance with Federal benefit programs, and in some instances is used to effect adjustments or recovery of improper payments made to or delinquent debts owed by a beneficiary or former beneficiary.</p>			
1. SERVICEMEMBER DATA			
a. NAME (Last, First, Middle Initial)		b. SSN	c. DATE OF BASIC ELIGIBILITY (YYYYMMDD)
d. RESERVE COMPONENT		e. UNIT IDENTIFICATION CODE (UIC)	f. UNIT TELEPHONE NO. (Include Area Code)
g. HOME MAILING ADDRESS (HOR) (Street, Apartment No., City, State, and ZIP Code)		h. UNIT OF ASSIGNMENT	
		i. UNIT ADDRESS (Street, Suite No., City, State, and ZIP Code)	
2. BASIC ELIGIBILITY CRITERIA			
<p>I meet the eligibility criteria for the Selected Reserve Educational Assistance program authorized in Chapter 1606 of title 10, U.S. Code, as follows:</p> <p>a. On or after October 1, 1990, I have agreed to serve six years in the Selected Reserve. If I am an officer, I agree to serve in the Selected Reserve for six years in addition to any other period of obligated Selected Reserve service I am required to perform.</p> <p>b. I have (or have completed the requirements for) a high school diploma or an equivalency certificate.</p> <p>c. I have completed Initial Active Duty for Training (IADT), if required.</p> <p>d. I am not receiving financial assistance under Section 2107 of title 10 U.S.C. (ROTC Scholarship).</p>			
3. SATISFACTORY PARTICIPATION			
<p>My basic eligibility to educational assistance benefits depends upon serving satisfactorily the complete 6-year term in the Selected Reserve as prescribed by military regulations. Failure to participate satisfactorily in required Reserve training means I will not be eligible for any benefits from the date of the unsatisfactory participation. If I fail to participate satisfactorily as a member of the Selected Reserve, I understand I will permanently lose all entitlements under this program and may be:</p> <p>a. Ordered to involuntary active duty for a period of up to two years or the period of my obligated service remaining, whichever is less, or</p> <p>b. Required to refund to the United States part of the money received from the Department of Veterans Affairs (VA) plus accrued interest for educational assistance under this program. Any refund I may be required to make does not affect my obligation to complete my service agreement in the Selected Reserve.</p>			
4. MONTHLY ENTITLEMENTS			
<p>I am entitled to a maximum of 36 months of educational assistance based upon full-time pursuit (or the equivalent based upon less than full-time pursuit). Benefits to which I am entitled under this program will be paid by the VA. It is my personal responsibility to apply to the VA in order to receive benefits. I understand I may receive no more than 48 months of benefits under two or more VA programs</p>			
5. AUTHORIZED NON-PARTICIPATION			
<p>If I am not able to continue to serve in the Selected Reserve for a valid reason approved by my Reserve component, following a period of satisfactory Reserve participation, I may be authorized up to one year of nonavailability, or up to three years in cases of a religious missionary obligation or with approval of the Service Secretary. I understand that I must reobligate for any approved period of nonavailability upon reaffiliation with a Reserve component. Failure to affiliate with the Selected Reserve at the end of this period will result in permanent ineligibility to benefits. Only one approved release is permitted during the 10 year benefit period.</p>			
6. EXPIRATION			
<p>My entitlements to unused educational assistance benefits will normally expire on the earlier of the following two dates:</p> <p>a. The 10th anniversary of eligibility to benefits if I remain a member in good standing during that period.</p> <p>b. On the date of separation from the Selected Reserve (except for those members separated from the Selected Reserve for a disability due to no fault of their own, or involuntarily separated during the period of October 1, 1991 through September 30, 1999, due to inactivation of their unit or position. In such case benefits are retained for the entire ten-year period).</p>			
7. UNDERSTANDING			
<p>I have read and understand each of the statements above and acknowledge that they are intended to constitute official notice and certification of my eligibility for Selected Reserve educational assistance benefits. I understand that this entitlement does not take precedence over forced attrition due to total force management decisions.</p> <p>I certify that, to the best of my knowledge, the above information is true and correct.</p>			
a. SERVICEMEMBER			
(1) NAME (Last, First, Middle Initial)	(2) GRADE	(3) SIGNATURE	(4) DATE SIGNED
b. COMMANDING OFFICER OR DESIGNEE			
(1) NAME (Last, First, Middle Initial)	(2) GRADE	(3) SIGNATURE	(4) DATE SIGNED

MEMBER APPLICATION GUIDELINES

1. The following steps must take place to receive educational benefits under the MGIB-SR.
 - a. If you completed a CG Form 5482/Statement of Understanding (SOU) and a DD Form 2384-1/Notice of Basic Eligibility (NOBE) at the end of Initial Active Duty Training (IADT) (Phase I) or at initial entry, follow the instruction in paragraph c below. If you are applying for benefits for the first time, you must ensure that you have a 6-year obligation in the SELRES at the time you elect to participate. If you do not have a current 6-year obligation, you must reenlist or extend your enlistment to meet this requirement. Contact your unit Yeoman or Educational Service Officer for assistance and obtain a SOU (reproduce from Enclosure 3 of this Instruction or from the SWIII - Forms Filler) or obtain a copy from your servicing Personnel Reporting Unit (PERSRU).
 - b. READ THE SOU CAREFULLY, fill it out, and SIGN it. Send the SOU to your servicing PERSRU. A copy of the SOU and a verified original NOBE will be returned to you. Sign the NOBE. Make 3 copies. Return the signed original to your servicing PERSRU. A copy will be filed in your unit record, forward one copy to CGPC-adm-3 and you will keep a copy.
 - c. Take your copies of the NOBE and SOU to your school VA education representative who will assist you in filling out an Application for Benefits, and complete a Certification of Enrollment form.
 - d. Your school will forward the completed forms to the VA Regional office in your area. The approximate time for processing and notification of eligibility from this point is 30 days.*
2. TROUBLESHOOTING
 - a. It is important to remember that any changes or corrections to your VA benefits record are done by the Coast Guard via DMDC. We determine eligibility. VA administers the Reserve GI Bill and processes payments.
 - b. If benefits notification is delayed beyond 30 days from the date your application was submitted to VA by the school, follow-up will be necessary. You should contact the VA Regional office in your area, and ask for a Benefits Inquiry. Ensure you inform the VA you are in the Coast Guard Reserve and the Coast Guard is processed for payment off-line. The VA is required to respond in 10 working days with an answer or solution to your problem. In addition, once your

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benefits have started, should VA terminate them for any reason, or you receive an overpayment notice from VA, it is important to respond in writing and keep copies of all correspondence.

- c. When problems cannot be resolved at your school or through the VA Regional Office, contact your unit ESO.
- d. If these sources do not bring satisfactory results, call the MGIB Project Officer at Headquarters via this toll free number: 1-800-283-8724.

*If you apply for benefits within 120 days of your basic date of eligibility (date in Block c. of the NOBE), you will receive a notification of your benefits award from VA within 60 days of your application.

If your application is submitted beyond 120 days of this date, VA will not process your claim until confirmation is reported in their computer system. This could take up to an additional 30 days. The average amount of time for processing from beginning application at your unit to receiving a check from VA is 90 days.

MONTGOMERY GI BILL - SELECTED RESERVE (MGIB-SR) RECOUPMENT
GUIDELINES

1. FAILURE TO PARTICIPATE SATISFACTORILY. A member of the Selected Reserve (SELRES) who acquires at least nine unexcused absences from scheduled training within a 12-month period is deemed as an unsatisfactory participant. Entitlement to MGIB-SR benefits shall be suspended on the date of the 9th unexcused absence. The member shall be notified by HRSIC (DC) of the reason for loss of entitlement and given an opportunity to respond before a final determination is made and termination of entitlement is processed. If the member is found to have failed to participate satisfactorily, termination of entitlement shall be effective on the date of the suspension of entitlement.
 - a. If a member fails to participate satisfactorily before completing the six year obligation incurred to qualify for MGIB-SR and has received educational benefits under reference (d), the Coast Guard has the option to:
 - (1) Order the member to active duty for up to two years or for the period of obligated Selected Reserve service remaining, whichever is less;
 - (2) Recoup funds as described below;
 - (3) Grant a waiver of the active duty requirement, a waiver of up to \$1500.00 and DOHA for over that amount. Waiver authority is Commandant (G-WPM-2). Waivers will be based on a determination that failure to participate satisfactory in required training was due to reasons beyond the member's control. Reserve members should use the established waiver process for any debts owed the U.S. Coast Guard.
2. RECOUPMENT PROCESS GUIDELINES
 - a. General
 - (1) The Coast Guard shall not be responsible for recoupment action on behalf of DoD Reserve Components.
 - (2) No recoupment action shall take place in the case of the death of a service member.

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- b. Defense Manpower Data Center (DMDC)
 - (1) Shall provide a weekly data transmission to Department of Veterans Affairs (VA) on all eligible and participating SELRES members.
 - (2) Shall report all members with an MGIB-SR eligibility code "H" (new code DD) or "3" (new code DE) immediately to VA for recoupment.
 - (3) Members coded with a suspension code (new "C" series code) shall be held for 12 months before transmitting report to VA. This period will allow a member to re-affiliate after an authorized period of absence or sufficient time to affiliate with another Reserve component. If the member exceeds the authorized time the member will lose their eligibility, the education benefits will be terminated permanently and all paid educational benefits will be recouped.
- c. VA Hines office maintains the eligibility database on all MGIB applicants. They will verify the member's eligibility status and forward record identified for recoupment status to VA St. Louis via a weekly-authorized transmission method.
- d. VA St. Louis Office
 - (1) Will verify the recoupment information on each unsatisfactory participant and calculate all educational benefits paid to the member under Chapter 1606.
 - (2) Forward the following information on SELRES member identified for recoupment to HRSIC(DC):
 - (a) Member's name
 - (b) SSN
 - (c) Total amount to be recouped by the Coast Guard. This will exclude any amount to be recouped by VA.
- e. Human Resource Systems Information Center (DC) (HRSIC)
 - (1) Send a letter to members who have become unsatisfactory participants. The letter should include the following information: (1) date the member became an unsatisfactory participant or date they failed to complete their six year drilling obligation, (2) the number of months remaining on their contract, (3) the amount of MGIB-SR paid as reported by VA, and (4) the formula used to calculate total amount of benefits to be recouped (10 USC 16135 (b)).
 - (2) Follow local instructions established for due process of debt collections.

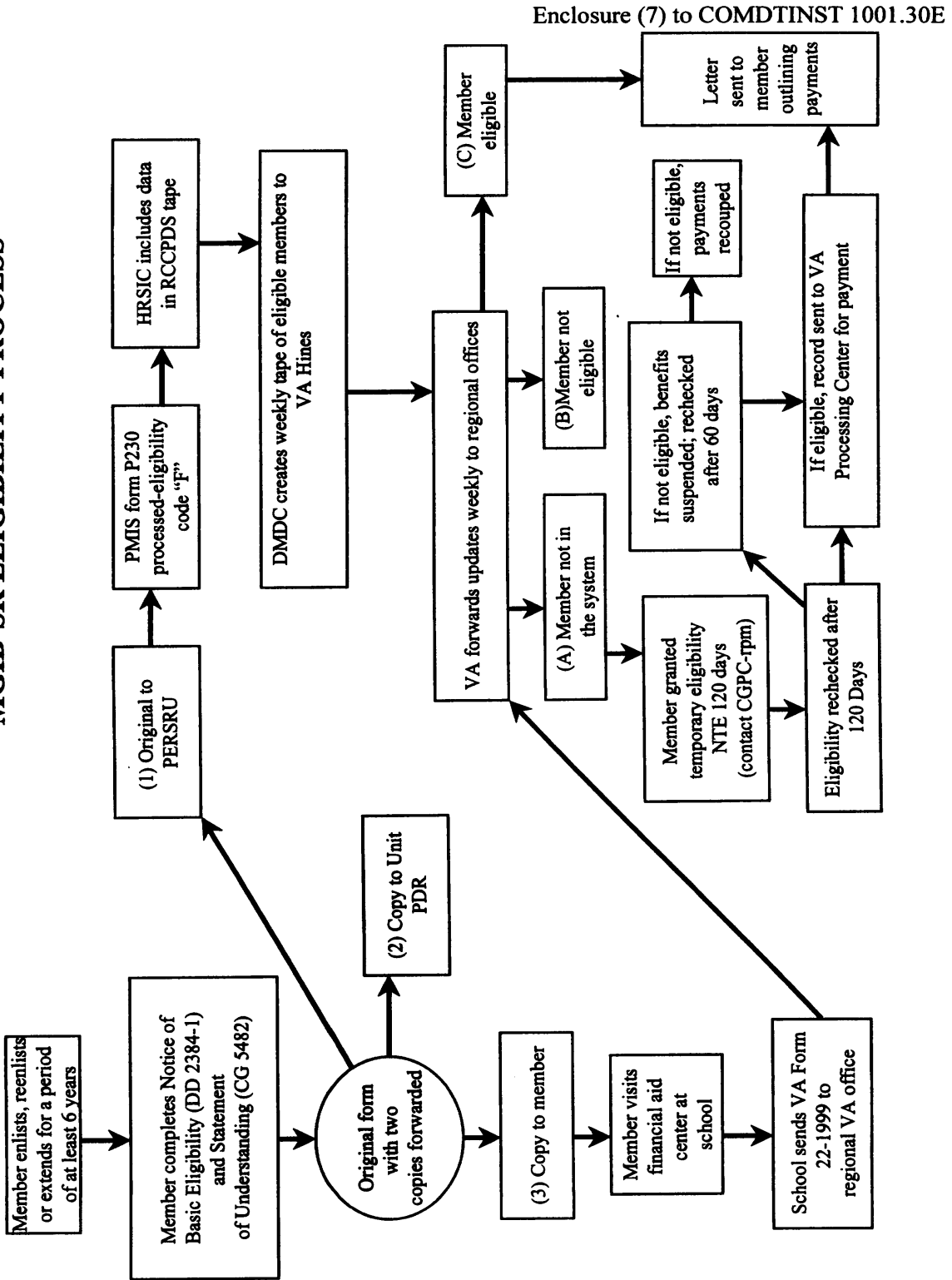
- (3) If member requests a waiver of debt, forward the request to Commandant (G-WTR-1) for review as outlined in 10 USC 16135 (a)(2).
 - (4) Notify the member of Commandant (WTR-1) decision on waiver of debt.
 - (5) Collect all monies due on MGIB-SR debts. Transfer collected debts, minus collection fees, to the RT appropriation AFC 90 account at Commandant (WTR-3) monthly.
 - (6) Provide G-WTR-1 with a monthly report on all MGIB-SR recoupment activities.
- f. Commandant (WTR-1)
- (1) Shall review recoupment waiver requests from members.
 - (2) (2) Shall forward to G-WPM-2 a recommendation on waiver.
- g. Commandant (WPM-2)
- (1) Shall review recoupment waiver request for members.
 - (2) Send a letter to HRSIC notifying them of final decision on waiver request.
3. PARTICIPATION REPORTING RESPONSIBILITIES
- a. Unit Commanding Officers
- (1) When a SELRES member fails to perform a scheduled IDT drill and the absence was not excused as per the Reserve Policy Manual, COMDTINST M1001.28 Chapter 2-B-4, the unit shall report the unexcused IDT drill to the servicing PERSRU.
 - (2) Shall notify the member after each unexcused drill. Also, advise the member that if they acquire 9 unexcused drills within 12 months they will lose their MGIB-SR eligibility and it may not be reinstated.
 - (3) When the member has received 9 unexcused drills in a 12 month period, forward the unsatisfactory participation package to the servicing PERSRU.
 - (4) If the member requests transfer to the ASP or another Reserve component, notify the servicing PERSRU so an MGIB-SR suspension entry can be made.

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- (5) If the member is separated for missionary studies, forward a copy of the approved release to the servicing PERSRU so an MGIB-SR suspension entry can be made.
 - (6) Ensure that authorized excused drills are not inadvertently reported as unexcused. Accuracy on reporting IDT drills will ensure the member is not reported as an unsatisfactory participant and lose their Reserve education benefits.
- b. Servicing PERSRU
- (1) Shall report all IDT drills using a PMIS transaction code R985.
 - (2) Shall enter the proper MGIB-SR code for all suspensions and terminations.
- c. HRSIC (MAS)
- (1) Shall report each unexcused IDT drill on the member's Leave and Earnings Statement (LES).
 - (2) Shall report all unsatisfactory participation on SELRES members to Defense Manpower Data Center (DMDC) through the Reserve Component Common Personnel Data System (RCCPDS).

Montgomery G.I. Bill - Selected Reserve (MGIB-SR) Chapter 1606 June 1998

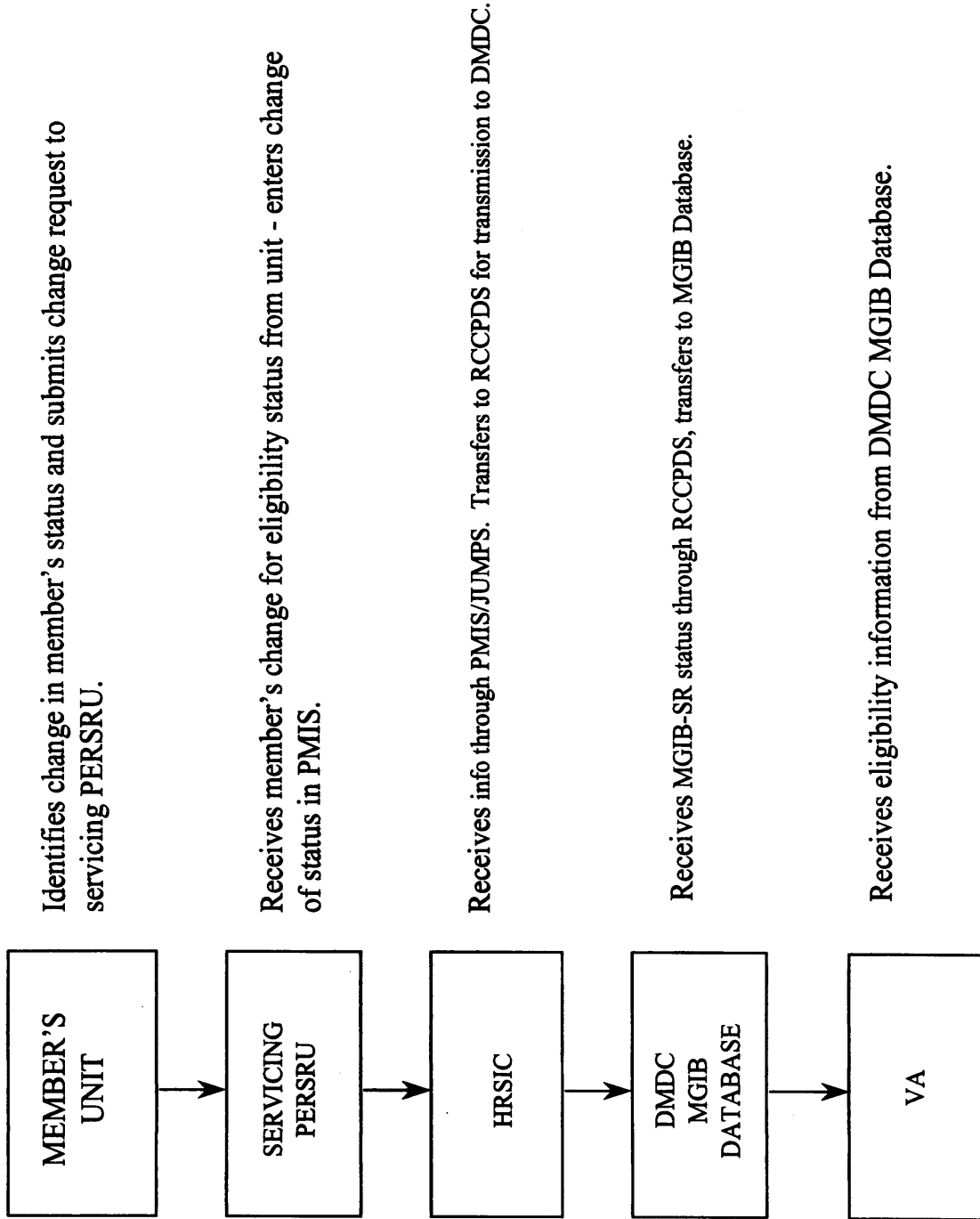
MGIB-SR ELIGIBILITY PROCESS



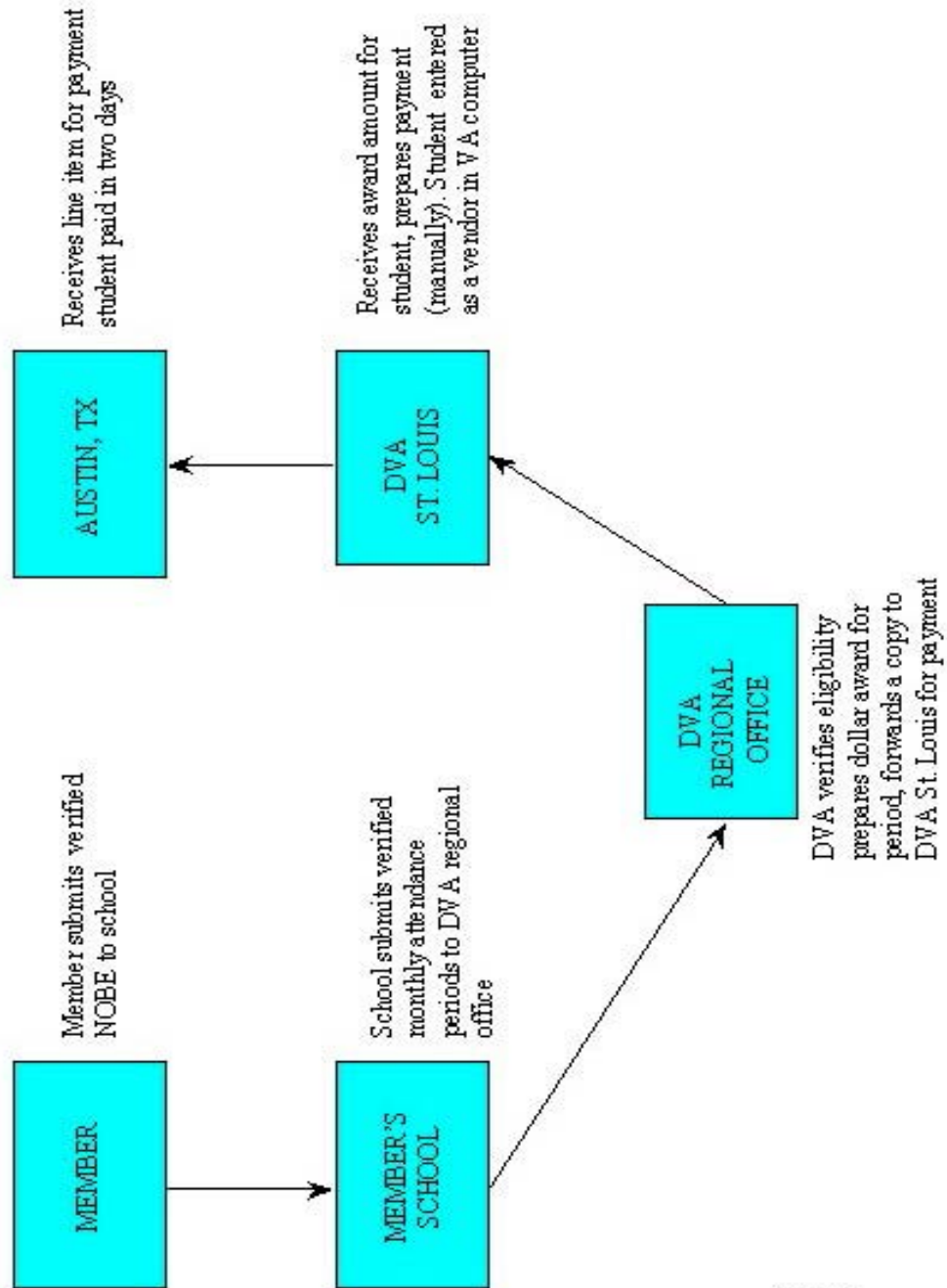
Enclosure (7) to COMDTINST 1001.30E

7/2/98

STATUS CODE CHANGE PROCESS FOR MGIB-SR BENEFITS



MGIB-SR PAYMENT PROCESS



MGIB-SR PAYMENT PROCESS