



COMDTINST M1780.3  
16 JUN 2020

COMMANDANT INSTRUCTION M1780.3

Subj: POST 9/11 AND MONTGOMERY GI BILL EDUCATIONAL ASSISTANCE PROGRAMS

Ref: (a) Title 38, United States Code  
(b) Title 10, United States Code  
(c) Post-9/11 GI Bill, DoDI 1341.13

1. PURPOSE. This Manual establishes Coast Guard policy concerning the implementation of the Post 9/11 and Montgomery GI Bill Educational Assistance Programs under Reference (a). It establishes policy and assigns responsibilities for implementing Coast Guard authorities and responsibilities under Chapter 33 of Title 38, United States Code (USC) (also known and hereafter referred to as the “Post-9/11 GI Bill”) and Chapter 30 of Title 38, USC (also known and hereafter referred to as the “Montgomery GI Bill”), establishes policy for the use of supplemental educational assistance (hereafter referred to as “kickers”), establishes policy for authorizing the transferability of education benefits (TEB) in accordance with section 3319 of the Post-9/11 GI Bill, section 3020 of the Montgomery GI Bill, and section 16132a Reference (a).
2. ACTION. All Coast Guard unit commanders, commanding officers, officers-in-charge, deputy/assistant commandants, and chiefs of headquarters staff elements must comply with the provisions of this Manual. Internet release is authorized.
3. DIRECTIVES AFFECTED. Montgomery GI Bill-Selected Reserve Educational Assistance Program (MGIB-SR), COMDTINST 1001.30E, Montgomery GI Bill-Active Duty Education Assistance Program (MGIB-AD), COMDTINST 1760.9A and Coast Guard Active Duty College Fund Program, COMDTINST 1760.10 are hereby cancelled.

DISTRIBUTION – SDL No. 170

	a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s	t	u	v	w	x	y	z	
A	X	X		X	X	X	X		X	X	X	X	X	X	X	X	X		X		X	X					
B	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
C	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
D	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X		X	X
E	X	X	X	X	X	X	X	X	X	X	X	X	X	X		X	X	X	X	X	X	X	X	X	X		
F																	X	X	X								
G		X	X	X	X																						
H	X	X	X	X	X	X	X	X		X	X																

NON-STANDARD DISTRIBUTION:

4. DISCUSSION. Citation of the word ‘article’ as used in this Manual is in general terms of reference, e.g., to denote paragraph or section, and is not citing CFR, USC, UCMJ, etc. except where so noted.
5. DISCLAIMER. This guidance is not a substitute for applicable legal requirements, nor is it itself a rule. It is intended to provide operational guidance for Coast Guard personnel and is not intended nor does it impose legally-binding requirements on any party outside the Coast Guard.
6. MAJOR CHANGES. The introduction of the Post 9/11 and Montgomery GI Bill Educational Assistance Programs Manual.
7. ENVIRONMENTAL ASPECT AND IMPACT CONSIDERATIONS.
  - a. The development of this Manual and the general policies contained within it were thoroughly reviewed by the originating office in conjunction with the Office of Environmental Management, Commandant (CG-47). This Manual is categorically excluded under current Department of Homeland Security (DHS) categorical exclusion (CATEX) A3 from further environmental analysis in accordance with Implementation of the National Environmental Policy Act (NEPA), DHS Instruction Manual 023-01-001-01 (series).
  - b. This Manual will not have any of the following: significant cumulative impacts on the human environment; substantial controversy or substantial change to existing environmental conditions; or inconsistencies with any Federal, state, or local laws or administrative determinations relating to the environment. All future specific actions resulting from the general policy in this Manual must be individually evaluated for compliance with the NEPA, DHS and Coast Guard NEPA policy, and compliance with all other applicable environmental mandates.
8. DISTRIBUTION. No paper distribution will be made of this Manual. An electronic version will be located on the following Commandant (CG-612) web sites. Internet: <https://www.dcms.uscg.mil/directives/>, and CGPortal: <https://cg.portal.uscg.mil/library/directives/SitePages/Home.aspx>.
9. RECORDS MANAGEMENT CONSIDERATIONS. This Manual has been evaluated for potential records management impacts. The development of this Manual has been thoroughly reviewed during the directives clearance process, and it has been determined there are no further records scheduling requirements, in accordance with Federal Records Act, 44 U.S.C. 3101 et seq., National Archives and Records Administration (NARA) requirements, and the Information and Life Cycle Management Manual, COMDTINST M5212.12 (series). This policy does not have any significant or substantial change to existing records management requirements.

10. FORMS/REPORTS. The forms referenced in this Manual are available in USCG Electronic Forms on the Standard Workstation or on the Internet: <http://www.dcms.uscg.mil/Our-Organization/Assistant-Commandant-for-C4IT-CG-6/The-Office-of-Information-Management-CG-61/Forms-Management/>. Department of Defense (DoD) forms may be found at: <https://www.esd.whs.mil/directives/forms/>.
11. REQUEST FOR CHANGES. Recommendations for changes or improvements are welcome and should be submitted via the chain of command to the Office of Military Personnel, Policy Sustainment, Commandant (CG-1334), at [HQS-PolicyandStandards@uscg.mil](mailto:HQS-PolicyandStandards@uscg.mil).

A.W. WILLIAMS /s/  
Captain, U.S. Coast Guard  
Acting Director of Military Personnel

PAGE INTENTIONALLY LEFT BLANK

RECORD OF CHANGES

CHANGE NUMBER	DATE OF CHANGE	DATE ENTERD	ENTERED BY

## Table of Contents

<b>CHAPTER 1</b>	<b>MILITARY EDUCATIONAL ASSISTANCE PROGRAMS .....</b>	<b>1-1</b>
A.	Purpose.....	1-1
B.	General Eligibility.....	1-1
C.	Bar to Duplication of Educational Assistance .....	1-1
D.	Responsibilities.....	1-1
<b>CHAPTER 2</b>	<b>MONTGOMERY GI BILL ACTIVE DUTY (MGIB-AD).....</b>	<b>2-1</b>
A.	Basic Entitlement.....	2-1
B.	MGIB-AD Kickers (Buy-Up Option).....	2-2
C.	Eligibility Exclusions.....	2-2
D.	Duration of Eligibility.....	2-3
E.	Extension of Eligibility.....	2-3
F.	Processing Montgomery GI Bill Elections .....	2-3
G.	Supplemental Educational Assistance for Additional Service.....	2-4
<b>CHAPTER 3</b>	<b>MONTGOMERY GI BILL SELECTED RESERVE (MGIB-SR).....</b>	<b>3-1</b>
A.	Basic Entitlement.....	3-1
B.	MGIB-SR Kicker Eligibility.....	3-1
C.	MGIB-SR Kicker Education Incentive.....	3-1
D.	Period of Entitlement .....	3-2
E.	Failure to Participate Satisfactorily in Required Training .....	3-5
<b>CHAPTER 4</b>	<b>POST 9-11 GI BILL.....</b>	<b>4-1</b>
A.	General Eligibility.....	4-1
B.	Kickers .....	4-2
C.	Transferability of Unused Education Benefits to Family Members .....	4-2
<b>CHAPTER 5</b>	<b>ENTITLEMENT AUTHORITIES.....</b>	<b>5-1</b>
A.	Montgomery GI Bill – Active Duty.....	5-1
B.	Montgomery GI Bill – Selected Reserve .....	5-1
C.	Post 9/11 GI Bill .....	5-1
D.	Reserve Educational Assistance Program (REAP).....	5-1

THIS PAGE INTENTIONALLY BLANK

**CHAPTER 1     MILITARY EDUCATIONAL ASSISTANCE PROGRAMS**

- A. Purpose. The purpose of Military Educational Assistance Programs is to promote recruitment and retention in the Uniformed Services. This Manual prescribes Coast Guard policies, and procedures for the administration of The Military Educational Assistance Programs and education incentives authorized by law under Reference (a).
- B. General Eligibility. Eligibility and administration of Military Educational Assistance Programs (Post-9/11 GI Bill, Montgomery GI Bill (MGIB-AD) and Montgomery GI Bill Selected Reserve (MGIB-SR)) are the responsibility of the Department of Veteran Affairs (VA). Policies and procedures for utilization of Military Educational Assistance Program benefits are available from the VA. These policies and procedures are codified in Title 38, Code of Federal Regulations (Reference (a)) and are presented and updated on the VA Webpage: <https://benefits.va.gov/gibill/>.
- C. Bar to Duplication of Educational Assistance.
1. A Service member cannot receive a duplication of education benefits from:
    - a. A Military Educational Assistance Program basic education benefit; or
    - b. A Military Educational Assistance Program Kicker education incentive; and
    - c. Any other federal source for education benefits at the same time, in whole or in part, in accordance with Section 3681 of Reference (a).
  2. Receipt of tuition assistance in accordance with Section 2007 of Reference (b) and a Military Educational Assistance Program education benefit does not constitute duplication.
  3. Any period of service counted for purposes of repayment of an education loan under Chapter 109 of Reference (b) may not be counted as a period of service for entitlement to educational assistance as prescribed in this Manual.
  4. Dual entitlement. The maximum aggregate period for VA-administered educational benefits in accordance with two or more provisions of law is 48 months (or its part-time equivalent). In some cases, the Service member may exhaust the Service member's entitlement in accordance with one provision and then continue receiving education benefits in accordance with another provision until an aggregate 48 months of entitlement is used. The Service member should contact the VA to determine eligibility.
- D. Responsibilities.
1. Commandant (CG-13) will:



- a. Publish policy concerning the Military Educational Assistance Programs.
  - b. Collaborate with the program manager to interpret law and DoD policies concerning the Military Educational Assistance Program.
2. Commander, Personnel Service Center (PSC-PSD-fs) will:
- a. Act as program manager of the Military Educational Assistance Programs.
  - b. Maintain liaison with the Office of the Assistant Secretary of Defense and other program managers within the armed services to coordinate GI Bill policy.
  - c. Maintain liaison with the VA on the regulations pertaining to the program, and assist the Service members with issues concerning their benefits.
  - d. Maintain liaison with the Defense Manpower Data Center (DMDC) to maintain transfer processes and regulations.
  - e. Coordinate with Command Leadership and Educational Service Officers (ESOs) to educate Service members on their GI Bill benefits.
  - f. Provide training to ESOs to ensure Service members have current information.
  - g. Support and provide benefit information to Coast Guard Transition and Relocation managers.
  - h. Process Coast Guard active duty Transfer of Education Benefits (TEB) requests and record GI Bill obligated active duty service for TEB in Direct Access (DA). Notify TEB rejected applicants of their rejection status and reason for rejection.
  - i. Provide a response to all Coast Guard related VA inquiries, Congressional Inquiries and Board of Correction to Military Records requests.
3. Commander, Personnel Service Center (PSC-RPM) will:
- a. Ensure separation authorities are aware of GI Bill TEB criteria impacts to Service members' eligibility.
  - b. Notify the program manager of approved separations.
  - c. Partner with the program manager to ensure Service members are appropriately counseled on GI Bill Program benefits and separation impacts.
  - d. Ensure approved TEB elections are revoked prior to approving voluntary retirements.
  - e. Act as the GI Bill liaison for the Coast Guard reserve component.

- f. Maintain GI Bill Program information for Reservists on the RPM website.
  - g. Process Coast Guard Reserve TEB requests. Record GI Bill obligated reserve duty service for TEB in DA. Notify TEB rejected applicants of their rejection status and reason for rejection.
  - h. Collaborate with the program manager to interpret law and DoD policies concerning the GI Bill Programs.
  - i. Provide a response to all Coast Guard Reserve related VA inquiries, Congressional Inquiries and Board of Correction to Military Records requests.
  - j. Process Coast Guard Reserve Notice of Basic Eligibility (NOBE) requests. Record MGIB-SR eligibility in DA.
4. Commander, Personnel Service Center (PSC-EPM) and (PSC-OPM) will:
- a. Ensure separation authorities are aware of GI Bill TEB criteria impacts to Service members' eligibility.
  - b. Partner with the program manager to ensure Service members are appropriately counseled on GI Bill Program benefits and separation impacts.
  - c. Ensure approved TEB elections are revoked prior to approving voluntary retirements. Note: Not required for CRSP involuntary retirements.
5. Accession Points (Coast Guard Academy, Officer Candidate School, and TRACEN Cape May) will:
- a. Conduct an orientation period on the GI Bill Programs. Ensure cadets, officer candidates, and recruits understand their GI Bill Program benefits.
  - b. Process Coast Guard and Coast Guard Reserve Notice of Basic Eligibility (NOBE) requests. Record MGIB and MGIB-SR eligibility in DA.
6. Coast Guard Recruiting Command will ensure recruiters provide information on the GI Bill to prospective applicants and ensure College Student Pre-Commissioning Initiative (CSPI) candidates understand that the CSPI program does not qualify them for GI Bill benefits.
7. Education Services Officers (ESOs) will:
- a. Educate Service members on GI Bill benefits.
  - b. Advise Service members as to effects of using GI Bill Programs and Tuition Assistance.

8. Decedent Affairs Officers (DAO) and Casualty Assistance Calls Officers (CACO) will:
  - a. Educate imminent death Service members on their GI Bill Education programs, their ability to transfer their GI Bill Education Benefits to their eligible dependents, and that no TEB request can be made after death of the Service member.
  - b. Inform spouse and/or surviving dependents of GI Bill Program benefits as designated by their deceased or dying Service member.
9. Service members eligible to transfer their GI Bill Program benefits to eligible dependents will:
  - a. Ensure they are familiar with GI Bill Program benefits and requirements.
  - b. Manage their GI Bill Program benefits, including TEB requests.

**CHAPTER 2 MONTGOMERY GI BILL ACTIVE DUTY (MGIB-AD)****A. Basic Entitlement.**

1. Service members are entitled to (Montgomery GI Bill (MGIB-AD) basic educational assistance in accordance with Chapter 30 of Title 38 of the United States Code. Eligibility for the MGIB-AD is broken down into the following four categories:
  - a. CATEGORY I.
    - (1) Entered AD for the first time after 30 June 1985, and didn't decline the MGIB in writing upon entry into active duty; and
    - (2) Had military pay reduced by \$100 a month for the first 12 months; and
    - (3) Completed a qualifying term of service. Served three or more years of continuous AD if the obligated period of service was three or more years, or served two or more years of continuous AD if the obligated period of service was less than three years, or served two years continuous AD plus 4 years in the Selected Reserve (SELRES).
  - b. CATEGORY II.
    - (1) Served at least one day between October 19, 1984 and June 30, 1985, and stayed on active duty through June 30, 1988 (or through June 30, 1987, if you entered the Selected Reserve within one year of leaving active duty and served four years), and
    - (2) Entered active duty before January 1, 1977; and
    - (3) On December 31, 1989, you had entitlement left from Vietnam-era GI Bill.
  - c. CATEGORY III.
    - (1) Not eligible for MGIB under Category I or II; and
    - (2) Before separation, you had military pay reduced by \$1,200; and
    - (3) One of the following is true;
      - (a) On active duty on September 30, 1990 and separated involuntarily after February 2, 1991; or
      - (b) Involuntarily separated on or after November 30, 1993; or
      - (c) Voluntarily separated under either the Voluntary Separation Incentive (VSI) or Special Separation Benefit (SSB) program.

d. CATEGORY IV.

- (1) On active duty on October 9, 1996 and you had money remaining in a Veteran's Educational Assistance Program (VEAP) account on the date and you elected MGIB by October 9, 1997; or
  - (2) Entered full-time National Guard duty under title 32, USC, between July 7, 1985 and November 28, 1989 and elected MGIB between October 9, 1996 and July 8, 1997; and
  - (3) Had military pay reduced by \$100 a month for 12 months or made a \$1,200 lump-sum contribution.
2. Service members must possess a high school diploma or an equivalency certificate (i.e. GED) before applying for benefits. An individual may meet this requirement by successfully completing the equivalent of 12 semester hours in an education program leading to a standard college degree.
  3. Service members must have received an honorable discharge, if separated.

B. MGIB-AD Kickers (Buy-Up Option). The "Buy-Up" option, also known as the "kicker", allows active duty members to contribute up to \$600 toward their MGIB to receive increased monthly benefits of up to an additional \$150 per month for 36 months. The additional contribution must be made while still on active duty. It is available for GI Bill recipients using Ch. 30 and cannot be extended beyond 36 months if a combination of GI Bill programs are used.

C. Eligibility Exclusions.

1. Commissioned officers are not eligible for the MGIB-AD if they:
  - a. Received a commission in the Armed Forces upon graduation from the U.S. Military, Naval, Air Force, or Coast Guard Academies after 31 December 1976; or
  - b. Completed a program of educational assistance, such as ROTC scholarship, under Section 2107 of Reference (b), unless the individual entered active duty after September 30, 1996 and received less than \$3,400 per year while participating in the program.
2. All such officers will sign the appropriate Section of DD Form 2366 (Montgomery GI Bill Act of 1984 (MGIB) Basic Enrollment), acknowledging their ineligibility for the MGIB, unless an exception under 2.C. of this Manual applies.

3. Officers outlined in this Chapter 2.C.1.a and b of this Manual who previously established MGIB-AD eligibility as an enlisted member will retain their eligibility after receipt of commission.

D. Duration of Eligibility.

1. MGIB benefits may be used up to 10 years from the date of last discharge or release from active duty, or when the Service member uses all months of entitlement, whichever is earlier. The 10-year period can be extended by the amount of time a Service member was prevented from pursuing a program of education during that period because of a disability or because Service member was held by a foreign government or power.
2. The 10-year period can also be extended if one reenters active duty for 90 days or more after becoming eligible (not counting any period of active duty for training). The extension ends 10 years from the date of separation from the later period. Periods of active duty of fewer than 90 days qualify for extensions only if one was separated for one of the following:
  - a. A service-connected disability,
  - b. A medical condition existing before active duty,
  - c. Hardship, or
  - d. A reduction in force.
3. For those individuals with a break-in-service between 1 January 1977 and 30 June 1985, the 10-year period in which to use benefits will be reduced by the length of time the member was not on AD during that timeframe.

E. Extension of Eligibility.

1. Under Section 3031 of Reference (a), veterans may receive an extension of the eligibility period if a physical or mental disability prevents them from initiating or completing their chosen program of education. The disability cannot be a result of their willful misconduct.
2. Extensions may be granted for the length that the disability prevented the Veteran from initiating or completing a program. Applicants may apply to the nearest Veteran Affairs Regional Office (VARO) for extensions.

- F. Processing Montgomery GI Bill Elections. All eligible members are automatically enrolled in the MGIB-AD, unless they choose to dis-enroll. The decision to dis-enroll must be made

at the time the Service member initially enters on active duty as a member of the Armed Forces.

G. Supplemental Educational Assistance for Additional Service.

1. As an enlistment and retention tool, the Commandant may increase the monthly basic educational assistance allowance paid to Service members who are entitled to basic educational assistance and who serve five or more consecutive years of active duty after the years of active duty counted under Chapter 2.A. of this Manual without a break in service, in accordance with 3021 of Reference (a). After the completion of the required active duty, the Service member must:
  - a. Be discharged from service with an honorable discharge, be placed on the retired list, or be placed on the temporary disability retired list;
  - b. Continue on active duty without a break in service; or
  - c. Be released from active duty for further service in a reserve component.
2. The amount of payment for supplemental educational assistance will not exceed a monthly rate of \$300 for an approved program of education pursued on a full-time basis. The amount of payment will be reduced for any approved program of education that a Service member pursues on less than a full-time basis.
3. In the case of a Service member who has a skill or is in a rating in which there is a critical shortage of personnel, the Commandant may increase the rate of supplemental educational assistance allowance at a monthly rate in excess of \$300, but any amount increase may not exceed an additional \$300 per month.

**CHAPTER 3 MONTGOMERY GI BILL SELECTED RESERVE (MGIB-SR)****A. Basic Entitlement.**

1. A Service member of the Selected Reserve is entitled to MGIB-SR basic education assistance in accordance with Section 16132 of Reference (b) if Service member
  - a. Enlists, reenlists, or extends an enlistment in an RC for service in the Selected Reserve after June 30, 1985, for a period of not less than 6 years or, in the case of an officer, when he or she agrees to serve in the Selected Reserve for 6 years beside any other period of obligated service in the Selected Reserve to which the office may be subject; and
  - b. Completes initial active duty training (IADT) requirements; and
  - c. Completes the requirements for the award of a high school diploma or equivalency certificate before applying for the MGIB-SR education entitlements.
2. The Service member must complete a DD Form 2384-1 as the official document to record entitlement to MGIB-SR and may only enter into one 6-year obligation for basic entitlement for MGIB-SR educational assistance.

**B. MGIB-SR Kicker Eligibility.** The Commandant may authorize a supplement to educational assistance to members of the Selected Reserve in Service-designated critically manned specialties, skills, or units. A Service member of the Selected Reserve is eligible for the MGIB-SR Kicker if Service member:

1. Enlists, reenlists, or extends a current enlistment to serve a period of not less than 6 years in the Selected Reserve, and in the case of an officer, agrees to serve in the Selected Reserve for 6 years, in an RC currently offering the MGIB-SR Kicker; and
2. Qualifies for and is assigned to a Service-designated critical specialty, skill, or unit in the Selected Reserve; and
3. Is currently in receipt of educational benefits from either MGIB-SR basic entitlement or from Sections 3011 or 3316 of Reference (a).

**C. MGIB-SR Kicker Education Incentive.**

1. MGIB-SR Kickers may be offered to an eligible Service member at the monthly rates of \$100, \$200, or \$350. MGIB-SR supplemental payments will not exceed \$350 each month.
2. The MGIB-SR Kicker is paid for a maximum of 36 months based on full-time pursuit of a program of education. Monthly payments for less than full-time pursuit of a program of



education will be adjusted like the MGIB-SR education entitlements benefit, as determined by the Secretary of Veterans Affairs.

3. The Service member may transfer to another specialty, skill, or unit after completing the 6-year obligation in the Selected Reserve for the MGIB-SR Kicker and retain eligibility for the MGIB-SR Kicker education incentive. The Service member must be entitled to educational assistance from either the MGIB-SR or Sections 3011 or 3316 of Reference (a) and will not have exhausted the full-time equivalent of 36 months of MGIB-SR Kicker education incentives.

D. Period of Entitlement.

1. The period of entitlement for MGIB-SR educational assistance begins on the date the Service member satisfies the basic entitlement criteria and completes the DD Form 2384-1. The period of entitlement for MGIB-SR will end:
  - a. Upon completion of the 10-year period that began on the date that MGIB-SR basic entitlement was established from July 1, 1985, to September 30, 1992, or separation from the Selected Reserve during the 10-year period, whichever came first; or
  - b. Upon completion of the 14-year period that began on the date that MGIB-SR basic entitlement was established from October 1, 1992 to June 29, 2008, or separation from the Selected Reserve during the 14-year period, whichever is earliest; or
  - c. On the date the Service member separates from the Selected Reserve, beginning on the date of MGIB-SR basic entitlement is established if after June 29, 2008.
2. Once entitlement to educational assistance for the MGIB-SR expires, or is terminated, any future MGIB-SR entitlement is also forfeited. Entitlement to MGIB-SR educational assistance will expire when:
  - a. A final determination is made of Service member's failure to participate satisfactorily in required training for the Selected Reserve, in accordance with Chapter 3.E of this Manual; or
  - b. The Service member receives financial assistance in the form of a Senior Reserve Officers Training Corps Scholarship in accordance with Section 2107 of Reference (b).
3. Suspension and restoration of entitlement for MGIB-SR educational assistance applies to all MGIB-SR education benefits and MGIB-SR Kicker education incentives. The period of entitlement to educational assistance may be suspended when:
  - a. The Service member is granted one authorized period of absence and may transfer to either the Individual Ready Reserve or the Standby Reserve, or may transfer to the

- Selected Reserve of another RC, except as cited in Chapter 3.D.4 of this Manual. Entitlement will be restored when the Service member re-affiliates in the Selected Reserve, before the end of a 3-year period for a religious missionary obligation or a 1-year period for all other circumstances. The required period of service will be adjusted by the amount of satisfactory service previously completed to total 6 years; or
- b. The Service member with a date of MGIB-SR basic entitlement after November 28, 1989, and before June 30, 2008, enters active duty. Entitlement will be restored provided the Service member commits within 1 year of release from active duty to serve in the Selected Reserve for a period that, with time already served for entitlement of the Service member to MGIB-SR education entitlements benefits in accordance with this Manual, must be equal to or greater than 6 years; or
  - c. The Service member is identified as pending a final determination of failing to participate satisfactorily in accordance with Chapter 3.E of this Manual. Entitlement will be restored when the Service member is determined to have participated satisfactorily in required training in the Selected Reserve; or
  - d. The Service member voluntarily departs the position or unit for which he or she received MGIB-SR Kicker eligibility. Eligibility will be restored for a Service member who returns to the same RC in a critical specialty, skill, or critical unit for which the MGIB-SR Kicker was granted or to a different designated critical specialty, skill, or unit in the RC that granted the MGIB-SR Kicker. After completion of the 6-year obligation period, suspensions of the MGIB-SR Kicker will be for periods of authorized absence granted in connection with the MGIB-SR entitlement.
4. Entitlement to MGIB-SR educational assistance and eligibility for MGIB-SR Kicker education incentives may continue or be extended when:
- a. A Service member is separated from the Selected Reserve because of a disability that was not the result of the individual's gross negligence or misconduct, and was

incurred on or after the date that the Service member became entitled to educational assistance in accordance with this Manual.

- (1) The Service member will retain entitlement through the end of the period of entitlement described in Chapter 3.D.1 of this Manual for a date of MGIB-SR basic entitlement established before June 30, 2008.
  - (2) For a Service member separated from the Selected Reserve with a date of MGIB-SR basic entitlement on or after June 30, 2008, the remaining period of entitlement will be 14 years after separation from the Selected Reserve.
- b. The Service member is enrolled in an educational institution and the period of entitlement for MGIB-SR will expire before Service member's completion of the enrolled course.
- (1) If the MGIB-SR will expire in accordance with Chapter 3.D.2 of this Manual, the period of entitlement will be extended to the end of the institution's quarter or semester.
  - (2) If the Service member is enrolled in an institution not operated regularly on a quarter or semester basis and the period of entitlement expires after a major portion of the course is completed, the period of entitlement will be extended to the end of the course, or for 12 weeks, whichever is the lesser period of extension.
- c. A Service member is ordered to active duty in accordance with Sections 12301(a), 12301(d), 12301(g), 12302, or 12304 of Reference (b) with a date of MGIB-SR basic entitlement before June 30, 2008. The Service member will have the period of entitlement for MGIB-SR extended for the period of active duty, plus 4 months. If the VA finds the order to active duty caused a Service member to discontinue a course in the pursuit of a program of education, and the Service member fails to receive credit or training time toward completion of the approved educational course objective, the education benefits paid for such a course will not be counted toward the authorized months of entitlement of the Service member.
- d. An enlisted Service member is separated from the Selected Reserve and immediately receives an appointment as an officer in the Selected Reserve of the same RC for the period that, with time already served for entitlement for MGIB-SR educational assistance in accordance with this Manual, is equal to or greater than 6 years.
- e. A Service member is precluded from filling the position for which he or she received MGIB-SR Kicker eligibility in accordance with Chapter 3.D.4.a. of this Manual, or is otherwise precluded from fulfilling Service member's commitment due to reclassification of a position to non-critical, transfer to another position at the

convenience of the government, or promotion in the specialty or skill career progression path that provided MGIB-SR Kicker eligibility.

E. Failure to Participate Satisfactorily in Required Training.

1. Entitlement to MGIB-SR educational assistance will be suspended on the date a Service member fails to participate satisfactorily. The Service member will be notified of the reason for loss of entitlement and given an opportunity to respond before a final determination is made. If a Service member is found to have failed to participate satisfactorily, termination of entitlement will be effective on the date of the suspension of entitlement.
2. A Service member who failed to participate satisfactorily before completion of the 6-year obligation or failed to re-affiliate after an authorized period of absence, and who received MGIB-SR educational entitlements will, at the discretion of the Service:
  - a. Be ordered to active duty involuntarily for up to 2 years or for the period of obligated service incurred in accordance with this Manual and remaining at the time of failure to participate satisfactorily, whichever is less; or
  - b. Repay used MGIB-SR and MGIB-SR Kicker education incentives. The amount of the refund to the United States will:
    - (1) Equal the number of months of Selected Reserve service the Service member has remaining for the MGIB-SR obligation divided by the original number of obligated months required for MGIB-SR entitlement and multiplied by the total amount of educational assistance provided to the Service member in accordance with Chapter 1606 of Reference (b); and
    - (2) Bear interest at the rate equal to the highest rate being paid by the United States on the day on which the refund is determined to be due for securities having maturities of 90 days or less and will accrue from the day on which the Service member is first notified of the amount due to the United States as a refund in accordance with this Manual. Any such refund will not affect the Selected Reserve period of obligation of the Service member; or
  - c. Be granted a waiver of the requirement to serve on active duty, a waiver of the total refund, or a waiver of a portion of the total refund once the amount due the government is determined. Waiver authority to serve on active duty may be delegated no lower than the head of the RC and will be based on a determination that failure to participate satisfactorily in required training was due to reasons beyond the control of the Service member.

3. Chapter 3.E.2 of this Manual also applies to recipients of MGIB-SR Kicker incentive payments who have failed to participate satisfactorily before completing the Service obligation required for MGIB-SR Kicker eligibility.
  - a. MGIB-SR Kicker incentive payments are subject to recoupment whether received as a supplement to education benefits under Chapter 2 of this Manual or as part of MGIB-SR education entitlement.
  - b. If the MGIB-SR basic entitlement and MGIB-SR Kicker eligibility 6-year obligation start dates are different, the recoupment formula is applied separately to the MGIB-SR education entitlement and to the MGIB-SR Kicker payment to determine the total amount of refund. Delinquent repayment is subject to interest charges, as described in Chapter 3.E.2.b of this Manual.

**CHAPTER 4 POST 9-11 GI BILL**

A. General Eligibility. A Service member is entitled to educational assistance under this Chapter under the following conditions:

1. An individual is eligible to receive 100% entitlement if:
  - a. The Service member serves an aggregate of at least 36 months of active duty in the Armed Forces commencing on September 11, 2001 and continues on active duty, or is discharged or released from active duty as described in Section 3311(c) of Reference (a).
  - b. The Service member serves at least 30 continuous days on active duty in the Armed Forces commencing on September 11, 2001 and as discharged or released from active duty for a service-connected disability.
  - c. The individual is a child or spouse of a Service member who, on or after September 11, 2001, dies in the line of duty while serving on active duty.
  - d. The Service member is awarded the Purple Heart for service in the Armed Forces occurring on or after September 11, 2001, and continues to serve on active duty or is discharged or released from active duty as described in Section 3311(c) of Reference (a).
2. A Service member is eligible to receive 90% entitlement if the member serves an aggregate of at least 30 months, but less than 36 months, on active duty commencing on or after September 11, 2001 and is discharged or released from active duty as described in Section 3311(c) of Reference (a).
3. A Service member is eligible to receive 80% entitlement if the member serves an aggregate of at least 24 months, but less than 30 months, on active duty commencing on or after September 11, 2001 and is discharged or released from active duty as described in Section 3311(c) of Reference (a).
4. A Service member is eligible to receive 70% entitlement if the member serves an aggregate of at least 18 months, but less than 24 months, on active duty commencing on or after September 11, 2001 and is discharged or released from active duty as described in Section 3311(c) of Reference (a).
5. A Service member is eligible to receive 60% entitlement if the member serves an aggregate of at least 12 months, but less than 18 months, on active duty commencing on or after September 11, 2001 and is discharged or released from active duty as described in Section 3311(c) of Reference (a).

6. A Service member is eligible to receive 50% entitlement if the Service member serves an aggregate of at least 6 months, but less than 12 months, on active duty commencing on or after September 11, 2001 and is discharged or released from active duty as described in section 3311(c) of Reference (a).
  7. A Service member is eligible to receive 40% entitlement if the Service member serves an aggregate of at least 90 days, but less than 6 months, on active duty commencing on or after September 11, 2001 and is discharged or released from active duty as described in Section 3311(c) of Reference (a).
- B. Kickers. The Secretary may authorize a supplement to educational assistance to Service members in critically manned specialties, skills, or units, or for a prescribed length of service in accordance with Section 3021 of Reference (a).
1. Enlistment Kickers. The use of enlistment kickers will be based on the criticality of the skill or the length of enlistment commitment and may be offered in amounts from \$150 to \$950 per month in increments of \$100.
  2. Affiliation Kickers. The use of affiliation kickers will be based on the criticality of the skill and/or unit and the length of Selected Reserve commitment, and may be offered in amounts from \$150 to \$950 per month in increments of \$100. If an individual is already eligible for an enlistment kicker, the amount of the affiliation kicker is limited to the amount that would take the total to \$950. For those individuals who are offered an affiliation kicker on top of an enlistment kicker, the increases above the enlistment kicker will be in \$100 increments.
  3. Reenlistment Kickers. The use of reenlistment kickers will be based on the criticality of the skill and may be offered in amounts from \$100 to \$300 per month in increments of \$100, based on length of additional service.
  4. Payment of Kickers. Kickers are paid by the VA in conjunction with the monthly stipend paid pursuant to Section 3313(c) of the Reference (a).
- C. Transferability of Unused Education Benefits to Family Members.
1. Subject to the provisions of Reference (c), an eligible Service member may request to transfer to one or more of the Service member's family members all or a portion of the Service member's entitlement to Post-9/11 GI Bill educational assistance. Transferability is neither an entitlement nor a transition or readjustment benefit. A Service member's request to elect to transfer benefits will not be automatically approved. Before approving an individual's request to elect to transfer benefits, the Coast Guard must determine whether the Service member is eligible for retention under current retention policies (e.g.,

high-year tenure) and is not precluded by either Service policy or statute from being retained for four additional years from the date of election.

2. Eligible Individuals. Any Service member, who is entitled to the Post-9/11 GI Bill at the time of the approval of the Service member's request to transfer that entitlement under this Section, may request to transfer that entitlement provided the Service member has at least six years of total credible military service (active duty or Selected Reserve) on the date of election. The determination of Service members' total years of creditable service will be based on the date of the member's TEB application, not the date the request is approved. Service performed in the Uniformed Services University of Health Sciences will not be considered service calculated for six years of eligibility. Eligibility does not guarantee approval. Members must have a minimum of four years of obligated service from the date of election and not be precluded, prior to approval, by either standard policy or statute.
  - a. Service members who have not applied for TEB, who are on limited duty or involved in a Medical Evaluation Board, Physical Evaluation Board (PEB), or Disability Evaluation System process must wait until the process is complete before applying. If found fit for duty, the Service member will comply with the standard TEB application procedure.
  - b. Service members who applied to TEB, but were denied due to insufficient retainability as a result of being on limited duty or being involved in a Medical Evaluation Board, Physical Evaluation Board (PEB), or Disability Evaluation System process and are later cleared to re-enlist, must request transferability again once they are found fit for duty and must have a minimum of four years of obligated service from the date of election, provided the member applies to TEB within 90 days of being informed of the fit for duty determination and meets all other eligibility criteria.
  - c. Service members who have been approved to TEB and have been subsequently found fit for duty may keep their TEB and fulfill their currently approved TEB obligation date.
3. Eligible Family Members.
  - a. An individual approved to transfer an entitlement to educational assistance under this Section may transfer that entitlement to Service member's spouse, or to one or more



- of the Service member's children, or to a combination of Service member's spouse and one or more children.
- b. Confirmation of family members will be made using the Defense Eligibility Enrollment Eligibility Reporting System (DEERS).
  - c. Once an individual has designated a child as a transferee, a child's subsequent marriage will not affect the transferee's eligibility to receive the educational benefit; however, the eligible individual retains the right to revoke or modify the transfer at any time. In accordance with Section 3319(f)(3) of Reference (a), TEB may not be treated as marital property, or the asset of a marital estate, subject to division in a divorce or other civil proceeding.
  - d. Once an individual has designated a spouse as a transferee, subsequent divorce will not affect the transferee's eligibility to receive educational benefits; however, the eligible individual retains the right to revoke or modify the transfer at any time.
4. Months of Transfer. Months transferred must be whole months. The number of months of benefits transferred by an individual under this Section may not exceed the lesser of:
- a. The months of Post-9/11 GI Bill unused benefits available.
  - b. Thirty-six months.
5. Transferee Usage.
- a. Policies and procedures for family member use of Post-9/11 GI Bill transferred educational benefits are the responsibility of the VA.
  - b. After approval of the TEB request, commencement of use by a family member is subject to following conditions:
    - (1) A spouse may start to use the benefit immediately upon approval of the request.
    - (2) A child may start to use the benefit after the individual making the transfer:
      - (a) Has completed at least 10 years of service; or
      - (b) Is separated for one of the reasons referred to in Chapter 4.C.8.b of this Manual.
6. Designation of Transferee. An individual transferring an entitlement to educational assistance under this Section will:
- a. Designate the family member or members to whom such entitlement is being transferred.

- b. Designate the number of months of such entitlement to be transferred to each family member.
  - c. Specify the period for which the transfer will be effective for each family member. The effective period must be on or after the date of designation.
7. Time for Transfer, Revocation, and Modification.
- a. Time for Transfer. An individual approved to transfer entitlement to educational assistance under this Section may transfer such entitlement to the individual's family member only while serving on active duty or actively participating in the Selected Reserve. An individual may not add family members after retirement or separation from the Service; except as for in Section 3319 of Reference (b) upon the death of the originally designated dependent.
  - b. Modification or Revocation.
    - (1) An individual transferring entitlement in accordance with this Section may modify or revoke at any time the transfer of any unused portion of the entitlement so transferred.
      - (a) An individual may add new family members, modify the number of months of the transferred entitlement for existing family members, or revoke transfer of entitlement while serving on active duty or Selected Reserve.
      - (b) An individual may not add family members after retirement or separation from the Service, but may modify the number of months of the transferred entitlement or revoke transfer of entitlement after retirement or separation for those family members who have received transferred benefits prior to separation or retirement.
    - (2) The modification or revocation of the transfer of entitlement must be made through the website <https://www.dmdc.osd.mil/milconnect/>.
8. Failure to Complete Service Agreement.
- a. Except as provided in this Section, if an individual transferring entitlement fails to complete the service agreed to consistent with Chapter 4.C.2 of this Manual, the amount of any transferred entitlement that is used as of the date of such failure must be treated as an overpayment of educational assistance and will be subject to collection by the VA.
  - b. Chapter 4.C.8.a. of this Manual will not apply to an individual who fails to complete the service agreement due to the following reasons:

- (1) The member's death.
- (2) Discharge or release from active duty or the Selected Reserve, with an honorable discharge, for a medical condition that pre-existed the member's service and was not service-connected.
- (3) Discharge or release from active duty or the Selected Reserve for hardship with an honorable discharge, as determined by the Secretary concerned.
- (4) Discharge or release from active duty or the Selected Reserve, with an honorable discharge, for a physical or mental condition, not a disability that did not result from the member's willful misconduct, but did interfere with the performance of duty.
- (5) Discharge or release from active duty or the Selected Reserve, with an honorable discharge, for an injury or disability found to be in the line of duty based on the results of Medical Evaluation Board and Disability Evaluation System processing where a member was found unfit for duty (with a medical separation or retirement order);
- (6) Discharge or release from active duty or the Selected Reserve, with an honorable discharge, due to reduction in force or force shaping initiative resulting from a decision by the Secretary; or
- (7) Discharge or release from active duty or the Selected Reserve, with an honorable discharge, due to twice failing to be selected for promotion as a commissioned officer on active duty or Selected Reserve.
  - (a) An officer not offered selective continuation will have the TEB obligation end date adjusted to Service member's separation or retirement date (if the officer has not already fulfilled TEB obligation end date of 4 years).
  - (b) An officer offered selective continuation who accepts selective continuation will have the TEB obligation end date adjusted to Service member's new selective continuation separation or retirement date (if the officer has not already fulfilled TEB obligation end date of 4 years).
  - (c) An officer offered selective continuation but who rejects selective continuation will have the TEB rejected (if the officer has not already fulfilled TEB obligation of 4 years) or does not directly affiliate into the Selected Reserve to complete TEB obligation, and has no break in service between active duty and Selected Reserve. The amount of any transferred entitlement that is used as of the date of such failure must be treated as an overpayment of educational assistance and will be subject to collection by the VA.

- (8) Failure to be advanced as an enlisted Service member and being separated under high-year tenure policies (or a change in these policies), unless separated at high-year tenure subsequent to reduction in rank through non-judicial punishment or court martial.
  - (a) A Service member with a high-year tenure mandatory separation/retirement date adjustment due to a Service-mandated change (not due to fault of Service member) will have the TEB obligation end date adjusted to the new high-year tenure mandatory separation/retirement date.
  - (b) A Service member with a high-year tenure mandatory retirement date adjustment due to fault of the Service member (e.g., demotion, court-martial) will not have the TEB obligation end date adjusted to the new high-year tenure mandatory retirement date.

PAGE INTENTIONALLY LEFT BLANK

**CHAPTER 5 ENTITLEMENT AUTHORITIES**

A. Montgomery GI Bill – Active Duty. Authority for entitlement and execution of MGIB-AD is located under Chapter 30 of Title 10, United States Code.

B. Montgomery GI Bill – Selected Reserve. Authority for entitlement and execution of MGIB-SR is located under Chapter 30 of Title 10, United States Code.

C. Post 9/11 GI Bill. Authority for entitlement and execution of the Post 9/11 GI Bill is located under Chapter 33 of Title 10, United States Code.

D. Reserve Educational Assistance Program (REAP). Authority for entitlement and execution of REAP is located under Chapter 1607 of Title 10, United States Code. Effective 25 November 2019, benefits under this authority is no longer payable to claimants. Claimants who have eligibility remaining will have their REAP entitlement automatically converted to Post 9/11 GI Bill. This conversion will be limited to the number of months remaining under REAP at the time of conversion at a minimum 60% benefit level. Service members may contact the Department of Veterans Affairs to determine remaining REAP benefits and conversion.