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

MN National Guard Circular 621-5-1

1 July 2008

Military Personnel

MINNESOTA NATIONAL GUARD STATE INCENTIVE PROGRAMS

Summary: This circular supersedes Minnesota National Guard Circular 621-5-1, dated 1 July 2007 with changes and is in effect unless superseded. It provides information and describes procedures for administering the Minnesota State Incentive Programs.

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

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

Interim Changes: Interim changes to this circular are not official unless authenticated by the JFHQ-J1. This circular becomes obsolete on the expiration date shown above, unless sooner rescinded or amended.

SUMMARY OF CHANGES

- Addition of MN Statute 190.03, and DOD Financial Management Regulation (DODFMR) to References
- State Tuition Reimbursement payments are now required to be direct deposited into the service member's bank account. Payments will no longer be made by check. Minnesota's Direct Deposit Form is available at <http://www.finance.state.mn.us/agencyapps/maps/directdepositform.pdf>
- Change to Chapter 1 – Overview, Subparagraph 1-7 Satisfactory Participation items b and c. Change from "within current state fiscal year" to "within last 12 months".
- Addition of Tuition Reimbursement option for Spouses to Chapter 2.
- Increase of Medical//Dental slots from 14 Army to 17 Army.
- Inclusion of Physician Assistants in Medical/Dental reimbursement program.
- Chapter 5 - LEADS Scholarship. Change in application requirements, the essay and commanders letter are no longer required.
- Chapter 6 – Clarification of unpaid bonus due upon death of Service member.
- Addition of Chapter 8 – Medic Recertification Bonus Program. Bonus intended for the recertification of EMT-B qualification required for 68W medics.

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CHAPTER 1

OVERVIEW

1-1. **GENERAL.** The Minnesota Legislature enacted legislation that provides funds for State Incentive Programs for members of the Minnesota National Guard. This circular describes the eligibility criteria and procedures for administering the Minnesota State Incentive Programs effective from 1 July 2008 through 30 June 2009, unless sooner rescinded or amended.

1-2. REFERENCES.

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

a. PURPOSE.

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

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

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

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

(4) Encourage the recruitment of women and minorities into the Minnesota National Guard.

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

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

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

b. RESPONSIBILITIES.

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

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

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

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

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

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

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

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

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

d. **STATE FISCAL YEAR.** The state fiscal year begins on 1 July and ends on 30 June.

e. **SATISFACTORY PARTICIPANT.** A satisfactory participant of the Minnesota National Guard is defined as a member who:

- a. Is an active drilling member of his/her unit of assignment or attachment.
- b. Has no period of absent without leave (AWOL)/unsatisfactory participation within the last 12 months.
- c. Has no more than four (4) periods of excused absence within the last 12 months.

f. **RECOUPMENT.**

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

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

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

- (1) Unit inactivation, relocation, or reduction in force (reorganization).
- (2) Interstate transfer to another National Guard unit.
- (3) Acceptance of appointment as an officer or warrant officer in the Minnesota National Guard.

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

CHAPTER 2

MINNESOTA STATE TUITION REIMBURSEMENT PROGRAM

2-1. **GENERAL.** The State of Minnesota sponsors the State Tuition Reimbursement Grant Program. The State Legislature appropriates the funding for the program biennially. If, in the future, the legislature does not fund the program, neither the State of Minnesota nor the Minnesota National Guard is obligated to continue such a program.

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

a. Current members of the Minnesota National Guard who:

- (1) Are serving satisfactorily as defined by the Adjutant General in paragraph 1-7; and
- (2) Have successfully completed Basic Training (BT) or Basic Military Training (BMT); and

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

b. Former members of the Minnesota National Guard who:

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

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

2-3. **RATE OF REIMBURSEMENT.** The Minnesota National Guard will reimburse up to 100% of the tuition charged for eligible coursework (undergraduate and graduate) at accredited post-secondary institutions, not to exceed 100% of the University of Minnesota Twin Cities campus, undergraduate tuition rate of \$326.92 per credit with a maximum of \$4250.00 per term for school year 2008-2009.

2-4. COURSE REQUIREMENTS.

a. Reimbursement is authorized for:

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

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

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

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

b. Reimbursement is not authorized for:

(1) Courses that were not completed.

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

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

c. If a service member receives a tuition waiver (no tuition paid or the fee statement indicates no tuition charges), reimbursement is not authorized. For example, high school students who attempt post-secondary coursework, where the courses are paid for by the high school, school district, or state, are not eligible to receive reimbursement for this coursework.

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

2-6. **ADMINISTRATION.**

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

b. A member must request tuition reimbursement **no later than 60** days from the last official day of the term.

c. The service member's fee statement is the source document for determining the amount of reimbursement. If the fee statement does not clearly show the amount of tuition charged, the soldier must obtain a letter from the institution that states the amount of tuition charged and a point of contact at the institution.

2-7. **ADDITIONAL SOURCES OF FUNDING.**

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

(1) The Montgomery GI Bill.

(2) Army National Guard Federal Tuition Assistance (ARNG FTA).

(3) Army Continuing Education System Tuition Assistance (ACES TA).

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

2-8. **APPLICATION PROCEDURES.**

a. Service Member's Responsibilities.

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

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

(b) Submit the signed MOU to his/her unit. Do not forward directly to the Education Service Office.

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

NG Form 621-5-1-R-E, (Annual Obligation Request) and submit it to the unit prior to beginning classes. Service members who enlist into the MN National Guard during a school term must submit the Annual Obligation Request prior to requesting payment. The annual obligation is an estimate of tuition cost for each term during the school year. The actual amount of reimbursement is dependent on the cost of tuition and the number of credits completed. The current school year is Summer Session II 2008 through Summer Session I 2009.

(2) The service member must submit a tuition reimbursement Payment Request (Annex A). Service member must submit the following forms and supporting documents to the unit in sufficient time for the reimbursement request to be entered into the payment request system **no later than 60** days from the last official day of the term. See paragraph 2-9 for information on incomplete coursework or late requests for reimbursement. Soldiers and Airmen enrolled in accelerated programs, where several terms are completed during the course of a normal semester should submit their requests in groups that correspond with a normal semester.

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

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

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

(d) State payments are now made via direct deposit using Minnesota Direct Deposit Authorization for EFT. The latest form available can be found at:

<http://www.finance.state.mn.us/agencyapps/maps/directdepositform.pdf>

b. Unit Responsibilities.

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

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

(3) Enter payment requests into the system immediately upon receipt from the soldier. All requests for reimbursement must be submitted **no later than 60** days from the last day of the school term. Prior to forwarding, the unit must complete the following:

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

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

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

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

c. ESO Responsibilities.

- (1) The ESO allocates funds according to the Annual Obligation Requests received.
- (2) Process payment requests.
 - (a) Verify all information is correct; this may include contacting the member's school.
 - (b) Calculate the actual amount of reimbursement.
- (3) Suspend payment for service members who have not completed basic training until notification that the training is complete. Process for payment upon notification of completion.
- (4) Suspend payment on Requests for Reimbursement that arrived at the ESO in excess of 60 days after the last official day of the school term. Process in the order received after 1 July providing funds remain for the State fiscal year.

2-9. INCOMPLETE COURSEWORK AND LATE REQUESTS.

a. Incomplete Coursework.

(1). If the service member has an incomplete, the unit should request payment for completed classes. Once the service member has finished the incomplete class(es), unit should request payment for those courses (specify which classes submitting for). Service member must submit reimbursement requests for **completed** courses **no later than 60** days from the last official day of the term; the ESO will reimburse for these courses provided annual obligation was submitted and funds are available.

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

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

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

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

b. Late Requests for Tuition Reimbursement.

(1). If a service member misses the 60-day suspense, he/she should still submit their request for reimbursement as soon as possible. Late requests will be held for payment until after 1 July 2009. Requests will be paid in the order received, providing funds are available for that fiscal year. The ESO does not guarantee payment of requests received after the 60-day window.

(2). The deadline for requesting reimbursement for coursework completed prior to July 2008 (school year 2007-2008) is 15 December 2008.

2-10. **TERMINATION.** The submission of a falsified grade report, transcript or fee statement, or an attempt to receive funds to which a member is not due will result in the termination from the State Tuition Reimbursement Program for a minimum of one year from the date of detection.

2-11. TUITION REIMBURSEMENT OPTION FOR SPOUSES.

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

- (1) Are serving satisfactorily as defined by the Adjutant General in paragraph 1-7; and
- (2) Have served at least 8 years of [active-drilling, non-ING] service in the Minnesota National Guard
- (3) Are between the ranks of **E-1 through O-5** (to include Warrant Officers). Spouses of Officers promoted to the grade of O6 during the school term are eligible to use the State Tuition and Textbook Reimbursement Program until the end of that term.

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

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

CHAPTER 3 TUITION REIMBURSEMENT - SURVIVOR ENTITLEMENT

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

3-2. **SCOPE.** This entitlement covers accident-related deaths that occur within the scope of a service member's assigned duties, while in a federal duty status or on state active service, as defined in Minnesota Statutes section 190.05. This entitlement also covers accidental death that occurs while directly between the service member's home of record and place of duty for drill attendance. Deaths from natural causes or suicide are excluded from this benefit.

3-3. **ELIGIBILITY.**

- a. The surviving spouse remains eligible for the benefit unless they remarry.
- b. Surviving dependents are eligible until their 24th birthday.
- c. Surviving spouse and eligible dependent(s) will remain eligible even if they move out of state and become a non-Minnesota resident.

3-4. **PROCEDURES.**

- a. The Office of the Adjutant General will issue a Letter of Eligibility that outlines the Tuition Reimbursement entitlement. The ESO will forward the letter to the surviving spouse; and if no spouse, to the oldest adult dependent; or the guardian of minor children. The letter will indicate by name, date of birth, social security number, and the dependents eligible for tuition reimbursement.
- b. The Minnesota Army National Guard Military Education Services Office will manage this benefit program and maintain files on all Letters of Eligibility issued.

3-5. **GUIDELINES.**

a. **RATE OF REIMBURSEMENT.** The Minnesota National Guard will reimburse up to **100%** of the tuition charged for eligible coursework (undergraduate and graduate) at accredited post-secondary institutions, not to exceed 100% of the University of Minnesota Twin Cities campus, undergraduate tuition rate of \$326.92 per credit with a maximum of \$4250.00 per term for school year 2008-2009.

b. **COURSE REQUIREMENTS.**

- (1) Reimbursement is authorized for:
 - (a) Courses taken at an accredited post secondary educational institution or certification program approved for veteran's benefits.
 - (b) Courses eligible for placement on a transcript from the post secondary educational institution.
 - (c) Undergraduate courses completed with a grade of "C" or higher.
 - (d) Graduate courses completed with a grade of "B" or higher.
- (2) Reimbursement is not authorized for:
 - (a) Courses that were not completed.

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

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

(3) If a student receives a tuition waiver (no tuition paid or the fee statement indicates no tuition charges), reimbursement is not authorized. For example, high school students who attempt post-secondary coursework, where the courses are paid for by the high school, school district, or state, are not eligible to receive reimbursement for this coursework.

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

d. **ADMINISTRATION.**

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

(2) A student must request tuition reimbursement **no later than 60** days from the last official day of the term.

(3) The student's fee statement is the source document for determining the amount of reimbursement. If the fee statement does not clearly show the amount of tuition charged, the soldier must obtain a letter from the institution that states the amount of tuition charged and a point of contact at the institution.

3-6. PAYMENT PROCEDURES.

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

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

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

b. Annual Obligation Request.

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

(2) The annual obligation is an estimate of tuition cost for each term during the school year. The actual amount of reimbursement is dependent on the cost of tuition and the number of credits completed. The current school year is Summer Session II 2008 through Summer Session I 2009.

c. Request for Reimbursement.

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

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

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

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

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

3-7. INCOMPLETE COURSEWORK AND LATE REQUESTS.

a. Incomplete Coursework.

(1) If the student has an incomplete, he/she should request payment for completed classes. Once the student has finished the incomplete class(es), he/she should request payment for those courses (specify which classes submitting for). Students must submit reimbursement requests for **completed** courses **no later than 60** days from the last official day of the term; the ESO will reimburse for these courses provided annual obligation was submitted and funds are available.

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

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

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

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

b. Late Requests for Tuition Reimbursement.

(a) If the Student misses the 60-day suspense, he/she should still submit their request for reimbursement as soon as possible. Late requests will be held for payment until after 1 July 2009. Requests will be paid in the order received, providing funds are available for that fiscal year. The ESO does not guarantee payment of requests received after the 60-day window.

(b) The deadline for requesting reimbursement for coursework completed prior to July 2008 (school year 2007-2008) is 15 December 2008.

3-8. TERMINATION.

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

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

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

CHAPTER 4

MEDICAL and DENTAL TUITION REIMBURSEMENT

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

4-2. **ELIGIBILITY.** Army officers appointed as medical students and Air Guard officers appointed in the Medical Service Corps are eligible for this program. The number of participants enrolled in the program cannot exceed 21 Soldiers or Airmen. Yearly allocations will be 14 medical or dental students and 3 physician assistant students for Army and 3 medical or dental students and 1 physician assistant student for Air. Coordination is encouraged between services to ensure all available allocations are utilized.

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

4-3. **RATE OF REIMBURSEMENT.** This program pays tuition reimbursement for medical and dental students, not to exceed 100% of the tuition costs at the University of Minnesota, Medical or Dental Schools, Twin Cities campus rate of \$9409.00 per term for school year 2008-2009.

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

4-5. APPLICATION PROCEDURES.

a. Memorandum of Understanding.

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

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

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

b. Annual Obligation Request.

(1) Complete the MN-NG Form 621-5-1-R-E (Annex A); submit form to AMEDD Recruiter or unit of assignment prior to beginning classes.

(2) The annual obligation is an estimate of tuition cost for each term during the school year. The actual amount of reimbursement is dependent on the school, credits and terms attended. The current school year is Summer Session II 2008 through Summer Session I 2009.

c. Requests for Reimbursement.

(1) The officer must submit the following forms and supporting documents to the AMEDD Recruiter, ANG Retention Manager or unit full-time staff in sufficient time for the reimbursement request to arrive at the ESO no later than 60 days from the last official day of the term.

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

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

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

(d) State payments are now made via direct deposit using Minnesota Direct Deposit Authorization for EFT. The latest form available can be found at:

<http://www.finance.state.mn.us/agencyapps/maps/directdepositform.pdf>

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

(3) The ESO does not guarantee payment on any request received in excess of 60 days after the last official day of the term. See paragraph 4-5a for information on submitting requests for late payment and incomplete coursework.

4-6. INCOMPLETE COURSEWORK AND LATE REQUESTS. Reference paragraph 2-9 and where "unit" is referenced, replace with "Army AMEDD Recruiter" or "ANG Retention Manager" where appropriate.

4-7. SERVICE OBLIGATION AND RECOUPMENT.

a. The service obligation for Medical Officers begins upon completion of residency and will run concurrently with all other service obligations. Medical Officers will incur a two year service obligation for each year of reimbursement under the provisions of this chapter. (Individuals who received Medical Tuition Reimbursement prior to 1 July 2008 will retain their original service obligation in accordance with the 2008 policy.)

b. The service obligation for Dental Officers and Physician Assistants will begin upon completion of graduate school and will run concurrently with all other service obligations. Participants will incur a two year service obligation for each year of reimbursement under the provisions of this chapter. (Individuals who received Dental Tuition Reimbursement prior to 1 July 2008 will retain their original service obligation in accordance with the 2008 policy.)

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

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

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

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

5-1. **GENERAL.** The Minnesota National Guard will award a maximum of 25 \$1,000 LEADS Scholarships to selected high school seniors who become a member of the Minnesota National Guard and complete the application process.

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

5-3. **ELIGIBILITY.**

- a. Applicant must be a high school senior.
- b. Membership with the Minnesota National Guard is required for scholarship payment.
- c. Applicant must be selected by the LEADS Scholarship selection committee.
- d. Recipient must complete basic training, enroll in a post-secondary education program, and incur expenses not covered by the Minnesota National Guard State Tuition Reimbursement program.

5-4. **APPLICATION PROCEDURES.**

- a. Application packets will contain the following items:
 - (1) Coversheet (Annex B, Appendix 1)
 - (2) High School Transcripts (Annex B, Para B-1.b.)
 - (3) Resume that highlights leadership activities and volunteerism (Annex B1, Appendix 2)
 - (4) Letter of Recommendation from Community Leader (Annex B, Appendix 3)
- b. Additional items that may accompany the application:
 - (1) Letters of Recommendation from Teachers/Coaches
 - (2) Newspaper Articles that feature the applicant

5-5. **PROCEDURES.**

- a. Applicant's Responsibilities.
 - (1) Prepare a resume.
 - (2) Obtain at least one letter of recommendation from community leader(s). Additional letters from teachers or coaches are recommended.
 - (3) Obtain a school certified copy of high school transcripts.
 - (4) Submit complete application to ESO no later than 15 March 2009. The ESO will return late scholarship applications without consideration for the award. The ESO will return incomplete scholarship applications without consideration for the award.
- b. Unit Responsibilities.

- (1) Contact all members who are high school seniors to inform them of the scholarship.
- (2) Assist applicants in preparing applications.
- (3) Ensure that the application contains all required documents and forward to the ESO no later than 15 March 2009.

c. Recruiting NCOIC Responsibilities.

- (1) Promote scholarship in unit schools and local media.
- (2) Assist ESO in coordinating the dates and locations of the award presentations.
- (3) Attend award banquets to present awards if needed.

d. ESO Responsibilities.

- (1) Advertise the LEADS Scholarship Program.
- (2) Maintain a database of the applicants.
- (3) Organize the scholarship selection committee.
- (4) Announce the recipients no later than 1 May 2009.
- (5) Prepare and send award letters to the recipients.

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

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

e. Scholarship Selection Committee's Responsibilities.

- (1) Evaluate all scholarship applications.
- (2) Recommend a maximum of 30 recipients to J1 Army.

f. J1 Army will approve or disapprove the awarding of the scholarships.

5-6. PAYMENT PROCEDURES.

a. Completion of basic training or basic military training and enrollment in a post-secondary institution is required before scholarship can be paid.

b. Procedure for payment:

(1) Service member submits application for payment once they have registered for classes. (Annex B, Appendix 3).

(2) State payments are now made via direct deposit using Minnesota Direct Deposit Authorization for EFT. The latest form available can be found at:

<http://www.finance.state.mn.us/agencyapps/maps/directdepositform.pdf>

(3) Education Services Office verifies completion of Basic Training.

(4) Education Services Office makes payment directly to the soldier to reimburse him/her for education expenses not covered by other awards under MN Stat §192.50.

CHAPTER 6

STATE COMMISSIONING BONUS

6-1. **GENERAL.** The Adjutant General has authorized a \$1,000 bonus upon initial commissioning/appointment for Soldiers in the Minnesota Army National Guard. Members of the Air National Guard who commission through the Commissioned Officer Training School (COTS), Medical Officer Training School (MOTS), or the Reserve Commissioned Officer School (RCOTS) will receive a \$3000 bonus.

6-2. **ELIGIBILITY.** Soldiers who are commissioned or appointed as a warrant officer are eligible for the commissioning bonus. Soldiers and Airmen who have previously held a commission or have been appointed as a warrant officer in any branch of service are ineligible for this bonus. Airmen who are commissioned through the Commissioned Officer Training School (COTS), Medical Officer Training School (MOTS), or the Reserve Commissioned Officer School (RCOTS) are eligible for the commissioning bonus. Soldiers and Airmen who started their commissioning/appointment course or were commissioned/appointed prior to 1 July 2008 will receive the bonus in accordance with the circular for that fiscal year. Fulltime members of the Minnesota National Guard are eligible for the State Commissioning Bonus.

6-3. PAYMENT PROCEDURES.

a. Army National Guard. RRM and/or the officer's section will coordinate with the ESO so the officer can be processed for payment. State payments are now made via direct deposit using Minnesota Direct Deposit Authorization for EFT. The latest form available can be found at:

<http://www.finance.state.mn.us/agencyapps/maps/directdepositform.pdf>

b. Air National Guard. The Base Education Training Manager at each of the air bases will e-mail the name SSN, and address of those who complete the COTS to the Education Services Office (education@mn.ngb.army.mil) so the officer can be processed for payment. State payments are now made via direct deposit using Minnesota Direct Deposit Authorization for EFT. The latest form available can be found at: <http://www.finance.state.mn.us/agencyapps/maps/directdepositform.pdf>

6-4. **TAXES.** Taxes are not withheld from the payment. The bonus recipient is responsible to report this payment as income when he/she completes individual Federal and State tax returns.

6-5. **RECOUPMENT.** All commissioning bonuses are contingent upon the soldier's/Airman's commencing training at the appropriate Officer Basic Course (OBC), Warrant Officer Basic Course (WOBC) or for airmen their appropriate commissioning program within 12 months of commissioning, per NGR 600-100, NGR 600-101 and ANGI 36-2005, with the exception of those soldiers/airman holding an approved OBC/WOBC extension request prior to commissioning date. Should the soldier/airman fail to begin the required OBC/WOBC per NGR 600-100/NGR 600-101, ANGI 36-2005, or in accordance with the provisions of an approved extension, the entire bonus will be recouped immediately.

CHAPTER 7

STATE REENLISTMENT BONUS

7-1. **GENERAL.** The Adjutant General has authorized a \$1,000 State Reenlistment bonus per year (with a maximum of \$5,000) for Soldiers and Airmen in the Minnesota National Guard.

7-2. **ELIGIBILITY.** Soldiers and Airmen who have completed six (6) years of service towards their initial eight (8) year service obligation and who have twelve (12) or fewer years of service creditable for retirement as indicated on NGB Form 23B or ANG PCARS form are eligible for this bonus.

- a. Meet Minnesota National Guard reenlistment eligibility criteria.
- b. Be qualified in and hold as primary the MOS/AFSC to which they are assigned and hold the rank and grade of, or no more than one grade below, the required grade of the position.
- c. Must have been a satisfactory participant during the 3 months prior to the date of their reenlistment.
- d. Reenlist for three or six years.
- e. Fulltime members of the Minnesota National Guard (AGR and Technicians) are eligible for the State Reenlistment Bonus.

7-3. PAYMENT PROCEDURES.

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

(1) Army National Guard: The Unit Retention Manager is responsible for forwarding the Reenlistment Bonus Addendum (Annex C) and a completed State of Minnesota direct deposit form to the Education Services Office so the member's payment can be processed. *Latest form available at <http://www.finance.state.mn.us/agencyapps/maps/directdepositform.pdf>*

(2) Air National Guard: The Base Retention Manager is responsible for forwarding the Reenlistment Bonus Addendum (Annex C) and a completed State of Minnesota direct deposit form to the Education Services Office so the member's payment can be processed. *Latest form available at <http://www.finance.state.mn.us/agencyapps/maps/directdepositform.pdf>*

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

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

7-5. RECOUPMENT.

- a. Bonus will be recouped if the service member:
 - (1) Becomes an unsatisfactory participant by—
 - (a) Accumulating **four (4) unexcused** absences within a **12-month period**. Recoupment will take effect on the date of the 4th unexcused absence; or—

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

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

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

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

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

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

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

d. Recoupment Matrix.

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

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

a. Service Member becoming an unsatisfactory participant by—

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

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

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

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

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

e. Separates from the ARNG or ANG for any reason unless due to death, injury, illness, or other impairment not the result of own misconduct. Need to send forward the date of separation.

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

CHAPTER 8

MEDIC RECERTIFICATION BONUS PROGRAM

8-1. GENERAL. The Adjutant General has authorized a \$1,000 bonus every two years for the purposes of National Guard Medic recertification as a qualified EMT-B.

8-2. ELIGIBILITY. The Medic Recertification Bonus is authorized for current members of the Minnesota National Guard who:

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

8-3. PAYMENT PROCEDURES.

- a. Service member completes EMT-B refresher course and turns in certificate of completion to unit clerk.
- b. Unit clerk has Service member sign Statement of Understanding and attaches certificate of completion, and emails documents to Education@mn.ngb.army.mil as request for payment.
- c. State payments are now made via direct deposit using Minnesota Direct Deposit Authorization for EFT. The latest form available can be found at:
<http://www.finance.state.mn.us/agencyapps/maps/directdepositform.pdf>

8-4. TAXES. Taxes are not withheld from the payment. The bonus recipient is responsible to report this payment as income when completing federal and state tax returns.

8-5. RECOUPMENT.

- a. Bonus will be recouped if the service member:
 - (1) Becomes an unsatisfactory participant by—
 - (a) Accumulating **four (4) unexcused** absences within a **12-month period**. Recoupment will take effect on the date of the 4th unexcused absence; or—
 - (b) Failing to attend or complete Annual Training (AT) without Commander approval. Recoupment will take effect on the first day of annual training.
 - (2) Fails to extend enlistment for time served in the ING within 30 days after return to unit. Recoupment is required from the effective date of transfer to the ING.
 - (3) Exceed maximum time in the ING (one year). Recoupment is required from the date of transfer into the ING.
 - (4) Separates from the Minnesota National Guard and enter active duty in a U.S. Armed service. Recoupment is required from date of separation.

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

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

8-6. **UNIT RESPONSIBILITIES.** Unit Retention Manager needs to notify the Education Services Office (ESO) immediately upon the following:

a. Service Member becoming an unsatisfactory participant by—

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

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

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

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

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

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

8-7. **TERMINATION.** Medic Recertification bonus will be terminated without recoupment upon commissioning/appointment into the Minnesota Army National Guard.

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

FOR THE ADJUTANT GENERAL:

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

OFFICIAL:
HETTEEN
ESO

DISTRIBUTION:
A (Army)
F (Air)

ANNEX A

MINNESOTA STATE TUITION REIMBURSEMENT PROGRAM MEMORANDUM OF UNDERSTANDING FALL 08-SUMMER 09

A-1. ACKNOWLEDGEMENT STATEMENT.

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

A-2. INTRODUCTION.

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

b. I also understand that if I do not meet all the criteria outlined in Minnesota National Guard Circular 621-5-1, dated 1 Jul 08, I may jeopardize my entitlement to receive reimbursement.

c. I understand that the State Tuition reimbursement Program will reimburse up to 100% of tuition, not to exceed 100% of the University of Minnesota Twin Cities campus, undergraduate tuition rate. That rate is currently \$326.92 per credit, with a maximum of \$4250.00 per term for school year 2008-2009.

d. I UNDERSTAND THAT NGB POLICY NOW STATES THAT SOLDIER'S CAN USE FTA AND STR IN CONJUNCTION WITH EACH OTHER PROVIDED THAT THE TOTAL COMBINED AMOUNT OF BENEFITS PAID DOES NOT EXCEED 100% OF ACTUAL TUITION/FEE'S COSTS.

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

A-3. CRITERIA FOR PARTICIPATION.

a. I understand that in order to be eligible for payment of tuition reimbursement, I must meet the following membership criteria:

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

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

(3) I must maintain active membership in the Minnesota National Guard throughout the entire term for which reimbursement is tendered. If I become a member during a school term, I will be eligible for payment of that term upon completion of basic training, provided all other criteria are met.

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

(1) I can have no periods of unauthorized absence (i.e. AWOL) within the last 12 months while participating in the program.

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

c. I understand the following additional requirements:

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

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

(3) The maximum lifetime benefit that I may receive under this program is equivalent to 208 quarter/144 semester credits.

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

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

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

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

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

A-4. REIMBURSEMENT PROCEDURES.

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

b. Annual Obligation Request.

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

(2) I understand that the annual obligation is an estimate of tuition cost for each term during the school year. The actual amount of reimbursement is dependent on the school, credits and terms attended. The school year is Summer Session II 2008 through Summer Session I 2009.

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

c. Request for Reimbursement Payment:

(1) I understand that I must submit the following forms and supporting documents to my unit in sufficient time for them to arrive at the ESO within 60 days after the last official day of the term. Soldiers and Airmen enrolled in accelerated programs, where several terms are completed during the course of a normal semester should submit their requests in groups that correspond with a normal semester. One submission each for Fall, Winter, Spring, Summer and Summer 2 terms.

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

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

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

(d) Direct deposit form – State payments are now made via direct deposit using Minnesota Direct Deposit Authorization for EFT. If your form is not already on file with the State (*not Federal*) Department of Finance, it needs to be included with your STR request. *Latest form available at <http://www.finance.state.mn.us/agencyapps/maps/directdepositform.pdf>*

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

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

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

(b) I understand that late requests will be processed in the order they are received and I will not receive payment for late requests until after 1 July 2008 provided there are funds remaining for the State fiscal year.

A-5 INCOMPLETE COURSEWORK AND LATE REQUESTS.

a. Incomplete Coursework.

(1) I understand that if I have an incomplete, that I should request payment for completed classes. Once I have finished the term I must submit reimbursement requests for **completed** courses **no later than 60** days from the last official day of the term; the ESO will reimburse for these courses provided annual obligation was submitted and funds are available.

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

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

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

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

b. Late Requests for Tuition Reimbursement.

(1)) I understand that if I miss the 60-day suspense, I should still submit their request for reimbursement as soon as possible. Late requests will be held for payment until after 1 July 2009. Requests will be paid in the order received, providing funds are available for that fiscal year. The ESO does not guarantee payment of requests received after the 60-day window.

(2) The deadline for requesting reimbursement for coursework completed prior to July 2008 (school year 2007-2008) is 15 December 2009.

A-5 **TERMINATION.**) I understand that the submission of a falsified grade report, transcript or fee statement, or an attempt to receive funds to which a member is not due will result in the termination from the State Tuition Reimbursement Program for a minimum of one year from the date of detection

A-6. **OTHER MEMBER'S RESPONSIBILITIES**

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

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

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

Signature of Service Member

Date

Signature of Unit Rep.

Date

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

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

AUTHORITY: 37 USC 308b title 37, USC and section 552a, title 5, USC

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

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

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

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

Current Mailing Address: _____

City: _____ State: _____ Zip Code: _____

Phone Number: _____ Official Military Email Address: _____

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

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

Unit Phone Number: _____ Unit Email Address: _____

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

School Year: _____ School Attending: _____

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

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

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

My Minnesota Direct Deposit Authorization for EFT form is attached. (Mandatory) _____ (initial)
Latest form available at <http://www.finance.state.mn.us/agencyapps/maps/directdepositform.pdf>

Remarks: _____

*I understand that this Annual Obligation Request is only an estimate and that the actual amount of tuition reimbursement will be based on the actual cost of tuition. I understand that I must complete all coursework at least a "C" grade of better for undergraduate and "B" or better for post-baccalaureate/graduate- level coursework
I further understand that it is my responsibility to ensure that my requests for reimbursement are forwarded to the Education Services Office within 60 days of the last day of the term.*

SIGNATURE DATE

MINNESOTA NATIONAL GUARD
STATE TUITION REIMBURSEMENT PROGRAM
PAYMENT REQUEST

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

AUTHORITY: 37 USC 308b title 37, USC and section 552a, title 5, USC

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

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

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

Name: _____ SSN: _____

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

Current Mailing Address: _____ City: _____ State: _____

Zip Code: _____ Official Military Email Address: _____ Telephone: _____

Unit: _____ Unit Phone Number: _____

Unit Email Address: _____

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

School Year _____ School Attended _____

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

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

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

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

My Minnesota Direct Deposit Authorization for EFT form is currently on file or attached. _____ (initial)
Latest form available at http://www.finance.state.mn.us/agencyapps/maps/directdepositform.pdf

Remarks: _____

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

Signature Date

Unit Administrator's Use Only:

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

- _____ The service member has completed basic training or basic military training.
_____ The service member has no more than four excused absences within the last 12 months.
_____ The service member has no unexcused absences within the last 12 months.

Printed name of Unit Administrator Unit Phone # Date

ANNEX B

LEADS SCHOLARSHIP APPLICATION PROCEDURES

B-1. APPLICATIONS CONSIST OF THE FOLLOWING

a. Coversheet. On a blank sheet of paper type the following information(Reference Appendix 1 to Annex B):

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

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

c. Resume that highlights leadership activities and volunteerism (Reference Appendix 2 to Annex B).

d. Letter of Recommendation from Community Leader.

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

e. Minnesota Direct Deposit Form:

<http://www.finance.state.mn.us/agencyapps/maps/directdepositform.pdf>

B-2 SUSPENSE

a. All applications must arrive at the ESO no later than 15 March 2009.
(1) ESO mailing address is:

DEPARTMENT OF MILITARY AFFAIRS
VETERANS SERVICE BUILDING
20 W 12TH STREET
SAINT PAUL, MN 55155-2098
ATTENTION: EDUCATION SERVICES

b. The ESO will return late or incomplete applications without consideration for the scholarship.

u

Private John E. Doe
SSN
1234 Street
Hometown, MN 55123

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

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

Cumulative GPA
3.9

Name
Address (Street)
Address (City, Zip)
Phone
Email

Objective: List your resume objective.

Education: List the names and dates of schools you have attended, example:

- 2004 to present, Minnesota High School

Work Experience: List the dates, name of employer, position title and brief description of work you have performed, for example:

- 2006 to present, McDonalds, Cashier
- Responsible for taking orders, operating cash register and giving outstanding customer service for busy, fast food restaurant.

School Activities: Examples include: Athletic activities, Student Council, Peer Counseling or Academic Clubs, example:

- 2005 to 2008, Varsity Hockey

Awards/Honors: Scholarships awarded, academic or athletic awards, organizational awards such as the Boy/Girl Scouts of American organizations etc.

Community Service: Coaching, fund-raising for non-profit organizations, Heart Association Walks, volunteer efforts etc.

Miscellaneous: Use this space to list any pertinent items that were not appropriate in the above headings.

LEADS SCHOLARSHIP APPLICATION FOR PAYMENT

1. Name (Last, First, MI): _____ Rank: _____
2. I certify that I am a drilling member of the Minnesota National Guard.
Circle: Y or N
3. I successfully completed Basic Training on _____ (Date) at
_____ (Fort/Post).
4. I am enrolled in post-secondary program at the following school/institution
 - a. Name: _____
 - b. Location: _____
5. I certify that I have incurred expenses for my post-secondary education that were not covered by the Minnesota National Guard Tuition and Textbook Reimbursement Program. (Note: These expenses can include the cost of books, class fees, transportation, living expenses, unreimbursed tuition costs, or any other education related expense.)
6. My Minnesota Direct Deposit Authorization for EFT form is currently on file or attached.
<http://www.finance.state.mn.us/agencyapps/maps/directdepositform.pdf>

I certify that the above statements are all true to the best of my knowledge and belief.

Date: _____

Signature: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____

(Do not write below this line, to be completed by State Incentive Lead)

01
100
P01
2042
006
4B00

NG LEADS Scholarship year: _____ SSN: _____ Amount \$ _____

Vendor #: _____ Transaction #: _____

(Department Authorized Signature)

(Date)

ANNEX C

**REENLISTMENT BONUS ADDENDUM
MINNESOTA NATIONAL GUARD**

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

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

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

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

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

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

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

a. I am qualified in and hold as primary the MOS/AFSC to which I am assigned and hold the rank and grade of, or am no more than one grade below, the required grade of the position.

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

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

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

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

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

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

2. _____ For a 6 year reenlistment I will receive a total bonus of \$5,000. The first \$1,000 payment will be processed on the date that my reenlistment contract takes effect (1 day after current ETS). Additional payments of \$1,000 will be paid once a year during my anniversary month until the \$5,000 limit is met.

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

c. State payments are now made via direct deposit using Minnesota Direct Deposit Authorization for EFT. If my form is not already on file with the State (*not Federal*) Department of Finance, I will attach a current authorization. *Latest form available at*
<http://www.finance.state.mn.us/agencyapps/maps/directdepositform.pdf>

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

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

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

b. Am flagged (*suspension of favorable personnel action per AR 600-8-2*) for an adverse action other than failure to maintain body composition standards or Army Physical Fitness Test (APFT) failure. _____(Initials)

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

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

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

a. Become an unsatisfactory participant by—

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

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

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

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

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

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

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

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

Date Signed Signature of soldier or Airman

Typed or Printed Name SSN of soldier or Airman

Typed or Printed Address of Soldier or Airmen

VERIFICATION BY SERVICE REPRESENTATIVE:

Unit/Address/Phone Number Date of signature

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

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

Contract was verified by State Program Manager for accuracy.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

c. State payments are now made via direct deposit using Minnesota Direct Deposit Authorization for EFT. Latest form available at <http://www.finance.state.mn.us/agencyapps/maps/directdepositform.pdf>

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

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

(1) 1 year for personal reasons.

(2) 3 years for missionary obligations.

b. Am flagged (*suspension of favorable personnel action per AR 600-8-2*) for an adverse action other than failure to maintain body composition standards or Army Physical Fitness Test (APFT) failure.
_____.(Initials)

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

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

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

f. Become an unsatisfactory participant by—

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

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

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

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

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

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

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

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

Date Signed Signature of soldier or Airman

Typed or Printed Name SSN of soldier or Airman

Typed or Printed Address of Soldier or Airmen

VERIFICATION BY SERVICE REPRESENTATIVE:

Unit/Address/Phone Number Date of signature

Typed/Printed Name/Rank of Unit Representative Signature of Unit Representative

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

Contract was verified by State Program Manager for accuracy.

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