OFFICE OF THE UNDER SECRETARY OF DEFENSE
4000 DEFENSE PENTAGON
WASHINGTON, DC 20301-4000

22 JUN 09

PERSONNEL AND
READINESS

MEMORANDUM FOR: SEE DISTRIBUTION

SUBJECT: Directive-Type Memorandum (DTM) 09-003: Post-9/11 GI Bill

References: (a) Title 38, United States Code
(b) Title 10, United States Code
(c) DoD 8910.1-M, "Department of Defense Procedures for Management of Information Requirements," June 30, 1998
(d) DoD Instruction 1336.5, "Automated Extract of Active Duty Military Personnel Records," May 2, 2001
(e) DoD Instruction 7730.54, "Reserve Components Common Personnel Data System (RCCPDS)," March 31, 2008
(f) Section 5561 note of title 5, United States Code

Purpose. This DTM:

- Establishes policy, assigns responsibilities, and prescribes procedures under chapter 33 of title 38, United States Code (U.S.C.) (Reference (a)) for carrying out the Post-9/11 GI Bill.

- Establishes policy for the use of supplemental educational assistance (hereafter referred to as "kickers") for members with critical skills or specialties, or for members serving additional service under section 3316 of Reference (a).

- Establishes policy for authorizing the transferability of education benefits (TEB) in accordance with section 3319 of Reference (a).

- Assigns responsibility to the Department of Defense Board of Actuaries to review valuations of the Department of Defense Education Benefits Fund in accordance with sections 183 and 2006 of title 10, U.S.C. (Reference (b)).

- This DTM is effective immediately; it shall be converted to a new DoD Instruction within 180 days.

Applicability. This Instruction applies to OSD and the Military Departments (including the Coast Guard at all times, including when it is a Service in the Department of Homeland Security (DHS) by agreement with that Department.), the Office of the Chairman of the Joint Chiefs of Staff and the Joint Staff, the Combatant Commands, the Office of the Inspector General of the Department of Defense, the Defense Agencies, the DoD Field Activities, and all other organizational entities within the Department of Defense (hereafter referred to collectively as the "DoD Components"). The term "Military Services," as used herein, refers to the Army, the Navy, the Air Force, the Marine Corps, and the Coast Guard.

Policy. It is DoD policy:

- That kickers may be authorized to assist in the recruitment and retention of individuals into skills or specialties in which there are critical shortages or for which it is difficult to recruit, or in the case of critical units, retain personnel.

- That transferability of education benefits be used by the Military Services to promote recruitment and retention.

- That the Secretary of Defense may limit the months of the entitlement that may be transferred to no less than 18 months, as specified in section 3319 of Reference (a), if needed to manage force structure and force shaping.

Responsibilities. See Attachment 1.

Procedures. See Attachment 2.

Information Requirements. The reporting requirements addressed within this DTM have been assigned Report Control Symbols DD-P&R(AR)1221, DD-P&R(Q)2077, DD-RA(M)1147, DD-RA(D)1148, DD-RA(D)2170, DD-RA(M)2171, DD-RA(D)2302, and DD-RA(M)2303 in accordance with the requirements of DoD 8910.1-M (Reference (c)).

Releasability. This DTM is approved for public release and is available on the Internet from the DoD Issuances Web Site at http://www.dtic.mil/whs/directives.

Effective Date. Policies and procedures under this DTM are effective immediately. The effective date of the Post-9/11 GI Bill is August 1, 2009.

William J. Carr
Deputy Under Secretary of Defense
(Military Personnel Policy)
Performing the Duties of the
Under Secretary of Defense
(Personnel and Readiness)

Attachments:
As stated

DISTRIBUTION:
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ATTACHMENT 1

RESPONSIBILITIES

1. DEPUTY UNDER SECRETARY OF DEFENSE FOR MILITARY PERSONNEL POLICY (DUSD(MPP)). The DUSD(MPP), under the authority, direction, and control of the Under Secretary of Defense for Personnel and Readiness, shall:

a. Develop guidance and procedures for implementation and oversight of the Post-9/11 GI Bill authorized by chapter 33 of Reference (a).

b. Coordinate administrative procedures with the Department of Veterans Affairs (DVA), as applicable.

c. Review and approve each Military Department plan to use supplemental assistance under the provisions of section 3316 of Reference (a).

d. Establish the standard data elements needed to administer the Post-9/11 GI Bill Program. (See Attachment 4 for a list of data elements relevant to this DTM.)

2. UNDER SECRETARY OF DEFENSE (COMPTROLLER)/CHIEF FINANCIAL OFFICER (USD(C)/CFO)). The USD(C)/CFO shall:

a. Provide guidance on budgeting, accounting, and funding for the educational benefits program in support of plans established in paragraph 2 of Attachment 2, and for investing the available DoD Education Benefits Fund balance.

b. In coordination with the DUSD(MPP), review and approve the Military Department budget estimates for the supplemental payments under the provisions of section 3316 of Reference (a).

3. SECRETARIES OF THE MILITARY DEPARTMENTS. The Secretaries of the Military Departments shall:

a. Provide regulations, policy implementation guidance, and instructions governing the administration of the Post-9/11 GI Bill program established under chapter 33 of Reference (a) consistent with this DTM and other guidance issued by the DUSD(MPP) and USD(C)/CFO consistent with the needs of the Military Services. Regulations must include Service implementation of kickers and the transfer of unused

educational benefits as established in section 3319 of Reference (a), as outlined in Attachment 2.

b. Ensure that all eligible active duty members and members of the Reserve Components are aware that they are automatically eligible for educational assistance under the Post-9/11 GI Bill program upon serving the required active duty time as established in chapter 33 of Reference (a).

c. Advise all officers without earlier established eligibility, following commissioning through Service Academies, with the exception of the Coast Guard Academy, or Reserve Officer Training Corps (ROTC) Scholarship Programs, that their eligibility period of active duty for Post-9/11 GI Bill benefits does not begin until they have completed their statutory obligated active duty service. Any active duty service after that obligated period of service may qualify as active duty service for Post-9/11 GI Bill eligibility.

d. Advise all Service members participating in the student loan repayment program under chapter 109 of Reference (b) that their service counted under chapter 109 does not count as qualifying active duty service for the Post-9/11 GI Bill Program. Any service after that obligated period of service may qualify as active duty service for Post-9/11 GI Bill eligibility.

e. Determine the need for supplemental educational assistance (kickers) for recruitment and retention of individuals with critical skills under section 3316 of Reference (a), and submit plans to the DUSD(MPP) for approval. That submission shall include justification for providing kickers based upon those skills, identification of skills for which kickers shall be offered, other special incentives offered based upon those skills, estimated number of participants, costs, and eligibility requirements.

f. Budget for and transfer funds to support the kickers, in accordance with Attachment 2 and guidance issued by the USD(C)/CFO.

g. Provide active duty participants and members of the Reserve Components with qualifying active duty service individual pre-separation or release from active duty counseling on the benefits under the Post-9/11 GI Bill and document accordingly.

h. Maintain records for individuals who receive supplemental educational assistance under section 3316 of Reference (a). Provide those records to the Defense Manpower Data Center and the DVA.

i. Use DoD standard data elements and codes established by DoD Instruction 1336.5 (Reference (d)) and DoD Instruction 7730.54 (Reference (e)) and listed in Table 2, when specified. A Military Service failing to comply either with the coding

instructions or with codes registered in the DoD Data Element Program shall be responsible for the conversion costs in accomplishing data interchange.

ATTACHMENT 2

PROCEDURES

1. GENERAL

a. Eligibility. The DVA is responsible for determining eligibility for education benefits under the Post-9/11 GI Bill. Generally, to be eligible for the Post-9/11 GI Bill, individuals must serve on active duty on or after September 11, 2001, for at least 30 continuous days with a discharge due to a service-connected disability; or an aggregate period ranging from 90 days to 36 months or more. See Attachment 3 for specific requirements.

b. Educational Assistance Benefits

(1) Benefits under the Post-9/11 GI Bill are based on a percentage, as determined by a Service Member's aggregate length of qualifying active duty service.

(a) Amount of tuition and fees charged, not to exceed the most expensive in-State undergraduate tuition at a public institution of higher learning in the State where the institution is located (tuition and fees paid directly to the school);

(b) Monthly stipend equal to the basic allowance for housing amount payable to a military E-5 with dependents, in the same ZIP code as the school that the student is attending (paid to the individual); and

(c) Yearly books and supplies stipend of up to $1,000 per year (paid to the individual on a quarter, semester, or term basis, as appropriate); and

(d) A one-time payment of $500 may be payable to certain individuals relocating from highly rural areas (paid to the individual on a quarter, semester, or term basis, as appropriate).

(2) Kickers, for those who are eligible, will be paid to the individual in conjunction with, and only when receiving, the monthly stipend.

(3) The monthly stipend and the books and supplies stipend are not payable to individuals on active duty.

(4) The monthly stipend allowance is not payable for those pursuing education and/or training at half time or less or to some individuals taking distance learning. Individuals enrolled at half time or less are eligible for an appropriately

reduced stipend for books and supplies. The DVA will determine under what, if any, circumstances an individual will be eligible for the monthly stipend while undertaking distance learning.

(5) Post-9/11 GI Bill benefits are subject to change based on legislative changes. The benefits are different for educational programs pursued on a full-time basis or at an applicable reduced rate determined by the Secretary of Veterans Affairs for less than full-time enrollment.

(6) Post-9/11 GI Bill benefits may be used for an approved program of education offered by an institution of higher learning (IHL). This includes graduate and undergraduate training, and some vocational or technical training programs. DVA is the final authority on program eligibility.

(7) Individuals may receive certain tutorial assistance (up to $100 per month for 12 months, not to exceed a total of $1,200) and reimbursement of one licensing and certification test (not to exceed a total of $2,000).

(8) Additionally, individuals who were eligible for Montgomery GI Bill (MGIB), Montgomery GI Bill –Selected Reserve (MGIB-SR), or Reserve Educational Assistance Program (REAP), and elect to use benefits under the Post-9/11 GI Bill will be eligible to receive benefits for programs approved under those provisions that are not authorized for those individuals under the Post-9/11 GI Bill, such as on-the-job training, apprenticeship training, correspondence courses, flight training, preparatory courses, and national exams at the benefit rate for MGIB, MGIB-SR, or REAP, as appropriate.

c. Benefits for Individuals Pursuing Education on Active Duty. Educational assistance is payable under the Post-9/11 GI Bill Program for pursuit of an approved program of education while on active duty.

(1) The amount of educational assistance payable shall be the lesser of the amount of assistance authorized in the manner specified under section 3014 (b)(1) of Reference (a), or the established institutional charges for tuition and fees required in similar circumstances of non-veterans enrolled in the same program.

(2) Concurrent Use of Post-9/11 GI Bill and Tuition Assistance (commonly called "Top Up"). In accordance with section 3313(e) of Reference (a), a Service member entitled to basic educational assistance who is pursuing education or training described in subsection (a) or (c) of section 2007 of Reference (b), may use, at their discretion, Post-9/11 GI Bill benefits to meet all or a portion of the charges of the educational institution for the education or training that are not paid by the Secretary of the Military Department concerned under such subsection. DVA shall administer fully that portion of the Post-9/11 GI Bill Program.

d. Time Limitation. As a general rule, eligible individual entitlements expire at the end of a 15-year period beginning on the Service member's last date of discharge or release from active duty of at least 90 consecutive days (30 days if released or discharged for service-connected disability). The Secretary of the Military Department concerned shall determine the last date of discharge or release, if such date cannot be determined clearly from the Service member's records.

e. Issues for Members with Entitlement to Existing Education Programs

(1) Members Eligible for Existing Programs. An individual may elect to receive educational assistance under chapter 33 of Reference (a), if such individual, as of August 1, 2009,

(a) Is entitled to basic educational assistance under MGIB, and has used, but retains unused, entitlement under that chapter;

(b) Is entitled to educational assistance under Educational Assistance Test Program (EATP), MGIB-SR, or REAP, and has used, but retains unused, entitlement under the applicable program;

(c) Is entitled to basic educational assistance under MGIB, but has not used any entitlement under that chapter;

(d) Is entitled to educational assistance under EATP, MGIB-SR, or REAP, but has not used any entitlement under such chapter;

(e) Is a member of the Armed Forces who is eligible for receipt of basic educational assistance under MGIB, and is making contributions toward such assistance under sections 3011(b) or 3012(c) of Reference (a); or

(f) Is a member of the Armed Forces who is not entitled to basic educational assistance under MGIB, by reason of an election under sections 3011(c)(1) or 3012(d)(1) of Reference (a); and

(g) As of the date of the individual's election under this paragraph, meets the requirements for entitlement to educational assistance under chapter 33 of Reference (a).

(2) Election Process. The method and process of making such election will be determined by DVA.

(3) Irrevocability of Election. An election made under paragraph 1.e.(1) of this attachment is irrevocable.

(4) Additional Eligibility. An individual entitled to educational assistance under the Post-9/11 GI Bill who is also eligible for educational assistance under the MGIB; chapters 31, 32, or 35 of Reference (a); EATP; MGIB-SR; REAP; or the provisions of section 5561 note of title 5, U.S.C. (the Hostage Relief Act of 1980) (Reference (f)) may not receive assistance under two or more such programs concurrently, but shall elect (in such form and manner as the Secretary of Veterans Affairs may prescribe) under which chapter or provisions to receive educational assistance.

(5) Cessation of Pay Reduction Under Montgomery GI Bill. Effective as of the first month beginning on or after the date of an election under paragraph 1.e.(1)(e) of this attachment, an individual having their pay reduced under the provisions of sections 3011(b) or 3012(c) of Reference (a), as applicable, shall have that pay reduction ceased, and the requirements of such section shall be deemed no longer applicable to the individual.

(6) Refund of Pay Reduction Under Montgomery GI Bill. An individual who is described in paragraph 1.e, whose pay was reduced under the provisions of sections 3011(b) or 3012(c) of Reference (b), will receive a refund of that pay reduction subject to the following:

(a) A full refund for an individual who used no months of benefit under the MGIB.

(b) A refund reduced by a proportion calculated by the number of months of MGIB benefits remaining at the time of election divided by 36.

(c) The refund will be added to the monthly stipend allowance paid in the last month of eligibility under the Post-9/11 GI Bill. Individuals who do not exhaust entitlement under the Post-9/11 GI Bill will not receive a refund of the pay reduction.

(7) Treatment of Certain Contributions Under MGIB and REAP (commonly called "Buy-Up")

(a) There is no provision to allow for increasing the amount allowed for Post-9/11 GI Bill benefits based on any contributions made by an individual under the provisions of section 3015(g) of Reference (a).

(b) There is no provision to allow for increasing the amount allowed for Post-9/11 GI Bill benefits based on any refund of contributions made by an individual under the provisions of section 16162(f) of Reference (b).

(8) Limitation on Entitlement for Certain Individuals. In the case of an individual eligible for MGIB who has used but retains unused entitlement, making an election to receive benefits under the Post-9/11 GI Bill, the number of months of entitlement of the individual to educational assistance under the Post-9/11 GI Bill shall be the number of months equal to the number of months of unused entitlement of the individual under MGIB as of the date of the election.

(9) Additional Educational and Training Availability. In addition to the educational benefits as described in paragraph 1.b(6) of this attachment, individuals who were eligible for benefits under MGIB, MGIB-SR, or REAP, and elect to use benefits under the Post-9/11 GI Bill, will be eligible to receive benefits for on-the-job training, apprenticeship training, correspondence courses, flight training, preparatory courses, and national exams at the benefit rate for MGIB, MGIB-SR, or REAP, as appropriate.

(10) Treatment of Existing Supplemental Educational Assistance (Kickers). Individuals eligible for kickers under either MGIB or MGIB-SR will remain eligible for such increased educational assistance. The payments shall be based upon the applicable monthly rate for the kickers. Payments shall be lump sum and made on a quarter, semester, or term basis as determined by the Secretary of Veterans Affairs.

2. SUPPLEMENTAL EDUCATIONAL ASSISTANCE (KICKERS)

a. Enlistment Kickers

(1) The Secretary of the Military Department concerned may offer an increase to the monthly amount of educational assistance otherwise payable to the individual under paragraph (1)(B) of section 3313(c) of Reference (a), or under paragraphs (2) through (7) of such section (as applicable), for members who initially enlist in a regular component in a skill or specialty in which there is a critical shortage of personnel or for which it is difficult to recruit. These increases in the monthly amount are known as enlistment kickers.

(2) The use of enlistment kickers should be based on the criticality of the skill and/or the length of enlistment commitment and may be offered in amounts from $150 per month to $950 per month in increments of $100. Reporting codes for enlistment kickers are listed in Attachment 4.

b. Affiliation Kickers

(1) The Secretary of the Military Department concerned may offer an increase to the monthly amount of educational assistance otherwise payable to an individual under paragraph (1)(B) of section 3313(c) of Reference (a), or under paragraphs (2) through (7) of such section (as applicable), to a member who is separating honorably from a regular component and who agrees to serve in the Selected Reserve in a skill, specialty, or unit in which there is a critical shortage of personnel or for which it is difficult to recruit and/or retain.

(2) The use of affiliation kickers shall 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 per month 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. Reporting codes for Affiliation Kickers are the same as the codes for Enlistment Kickers listed in Attachment 4.

c. Reenlistment Kickers

(1) The Secretary of the Military Department concerned may offer an increase to the monthly amount of educational assistance otherwise payable to an individual under paragraph (1)(B) of section 3313(c) of Reference (a), or under paragraphs (2) through (7) of such section (as applicable), to a member who, after completing 5 or more years of continuous service, signs an agreement to remain on active duty for a period of at least 2 years.

(2) The use of reenlistment kickers should be based on the criticality of the skill and may be offered in amounts from $100 per month to $300 per month in increments of $100, based on length of additional service. Reporting codes for reenlistment kickers are listed in Attachment 4.

d. Limitations. Since kickers are paid in conjunction with the monthly stipend paid under section (1)(B) of section 3313(c) of Reference (a), members eligible for kickers should be aware of the limitations on payment.

(1) No payment will be provided for education pursued on half-time basis or less.

(2) No payment will be provided for education and/or training pursued solely through distance learning.

(3) No payment will be provided for use while serving on active duty.

3. TRANSFERABILITY OF UNUSED EDUCATION BENEFITS TO FAMILY MEMBERS. Subject to the provisions of this attachment, the Secretary of the Military Department concerned, to promote recruitment and retention of members of the Armed Forces, may permit an individual described in paragraph 3.a. of this attachment, who is entitled to educational assistance under the Post-9/11 GI Bill, to elect to transfer to one or more of the family members specified, all or a portion of such individual's entitlement to such assistance.

a. Eligible Individuals. Any member of the Armed Forces on or after August 1, 2009, who, at the time of the approval of the individual's request to transfer entitlement to educational assistance under this section, is eligible for the Post-9/11 GI Bill, and

(1) Has at least 6 years of service in the Armed Forces (active duty and/or Selected Reserve) on the date of election and agrees to serve 4 additional years in the Armed Forces from the date of election, or

(2) Has at least 10 years of service in the Armed Forces (active duty and/or Selected Reserve) on the date of election, is precluded by either standard policy (Service or DoD) or statute from committing to 4 additional years, and agrees to serve for the maximum amount of time allowed by such policy or statute, or

(3) Is or becomes retirement eligible during the period from August 1, 2009, through August 1, 2013, and agrees to serve the additional period, if any, specified in paragraphs 3.a.(3)(a) through 3.a.(3)(e) of this attachment. A Service Member is considered to be retirement eligible if he or she has completed 20 years of active Federal service or 20 qualifying years as computed under section 12732 of Reference (b).

(a) For those individuals eligible for retirement on August 1, 2009, no additional service is required.

(b) For those individuals who have an approved retirement date after August 1, 2009, and before July 1, 2010, no additional service is required.

(c) For those individuals eligible for retirement after August 1, 2009, and before August 1, 2010, 1 year of additional service is required.

(d) For those individuals eligible for retirement on or after August 1, 2010, and before August 1, 2011, 2 years of additional service is required.

(e) For those individuals eligible for retirement on or after August 1, 2011, and before August 1, 2012, 3 years of additional service is required.

b. Eligible Family Members

(1) An individual approved to transfer an entitlement to educational assistance under this section may transfer the individual's entitlement to:

(a) The individual's spouse.

(b) One or more of the individual's children.

(c) A combination of the individuals referred to in paragraphs 4.b.(1)(a) and 4.b.(1)(b) of this attachment.

(2) A family member must be enrolled in the Defense Eligibility Enrollment Reporting System (DEERS) and be eligible for benefits at the time of transfer to receive transferred educational benefits.

(3) A child's subsequent marriage will not affect his or her eligibility to receive the educational benefit; however, after an individual has designated a child as a transferee under this section, the individual retains the right to revoke or modify the transfer at any time.

(4) A subsequent divorce will not affect the transferee's eligibility to receive educational benefits; however, after an individual has designated a spouse as a transferee under this section, the eligible individual retains the right to revoke or modify the transfer at any time.

c. Months of Transfer. Months transferred must be in whole months. The Secretary of Defense may limit the months of entitlement that may be transferred to no less than 18 months. The number of months of benefits transferred by an individual under this section may not exceed the lesser of:

(1) The months of unused benefits available under the Post-9/11 GI Bill, or

(2) 36 months, or

(3) The number of months specified by the Secretary of Defense.

d. Transferee Usage. Dependent use of transferred educational benefits is subject to the following:

(1) A spouse:

(a) May start to use the benefit only after the individual making the transfer has completed at least 6 years of service in the Armed Forces.

(b) May use the benefit while the member remains in the Armed Forces or after separation from active duty after completing the additional service required to transfer the educational assistance under the Post-9/11 GI Bill referred to in paragraph 3a.

(c) Is subject to the same 15-year limitation as the eligible individual as stipulated in paragraph 1.d of this attachment.

(2) A child:

(a) May start to use the benefit only after the individual making the transfer has completed at least 10 years of service in the Armed Forces.

(b) May use the benefit while the eligible individual remains in the Armed Forces or after separation from active duty after completing the additional service required to transfer the educational assistance under the Post-9/11 GI Bill referred to in paragraph 3a.

(c) May not use the benefit until they have attained a secondary school diploma (or equivalency certificate), or reached 18 years of age.

(d) Is not subject to the time limitation in paragraph 1.d. of this attachment, but may not use the benefit after reaching 26 years of age.

e. Nature of Transferred Entitlement. The entitlement transferred will be available as follows:

(1) An eligible spouse:

(a) Is entitled to educational assistance under this chapter in the same manner as the individual from whom the entitlement was transferred.

(b) Is not eligible for the monthly stipend or books and supplies stipend while the sponsor is serving on active duty.

(2) An eligible child:

(a) Is entitled to educational assistance under this chapter in the same manner as the individual from whom the entitlement was transferred as if the individual were not on active duty.

(b) Is entitled to the monthly stipend and books and supplies stipend even though the eligible individual is on active duty.

f. Designation of Transferee. An individual transferring an entitlement to educational assistance under this section shall, through notification to the Secretary of the Military Department concerned, as specified in paragraph 3.i. of this attachment:

(1) Designate the dependent or dependents to whom such entitlement is being transferred;

(2) Designate the number of months of such entitlement to be transferred to each dependent; and

(3) Specify the period for which the transfer shall be effective for each dependent.

g. Time for Transfer, Revocation, and Modification

(1) 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 as a member of the Armed Forces.

(2) Modification or Revocation

(a) An individual transferring entitlement under this section may modify or revoke at any time the transfer of any unused portion of the entitlement so transferred.

1. An individual may add new dependents, modify the number of months of the transferred entitlement for existing dependents, or revoke transfer of entitlement while serving in the Armed Forces.

2. An individual may not add dependents after retirement or separation from the Armed Forces, but may modify the number of months of the transferred benefit or revoke transferred benefits after retirement or separation for those dependents who had received transferred benefits prior to separation or retirement.

(b) The modification or revocation of the transfer of entitlement under this paragraph shall be made by submitting notice of the action to both the

Secretary of the Military Department concerned and the Secretary of Veterans Affairs. Additions, modifications, or revocations made while in the Armed Forces will be made through the Transferability of Educational Benefits (TEB) Web Site as described in paragraph 3i. Modifications or revocations after separation from the Armed Forces will be accomplished through the DVA.

h. Additional Administrative Matters

(1) Use. The use of any entitlement to educational assistance transferred under this section shall be charged against the entitlement of the individual making the transfer at the rate of 1 month for each month of transferred entitlement that is used.

(2) Death of Transferor. The death of an individual transferring an entitlement under this section shall not affect the use of the entitlement by the dependent to whom the entitlement is transferred.

(3) Scope of Use by Transferees. The purposes for which a dependent to whom entitlement is transferred under this section may use such entitlement shall include the pursuit and completion of the requirements of a secondary school diploma (or equivalency certificate).

(4) Joint and Several Liability. In the event of an overpayment of educational assistance with respect to a dependent to whom entitlement is transferred under this section, the dependent and the individual making the transfer shall be jointly and severally liable to the United States for the amount of the overpayment for purposes of section 3685 of Reference (a).

(5) Failure to Complete Service Agreement

(a) Except as provided in paragraph 3.h.(5)(b) of this attachment, if an individual transferring entitlement under this section fails to complete the service agreed to by the individual under paragraph 3.a of this attachment in accordance with the terms of the agreement of the individual under that paragraph, the amount of any transferred entitlement under section 3 that is used by a dependent of the individual as of the date of such failure shall be treated as an overpayment of educational assistance (see paragraph 3.h.(4) of this attachment) and will be subject to collection by DVA.

(b) Paragraph 3.h.(5)(a) of this attachment shall not apply in the case of an individual who fails to complete service agreed to by the individual due to:

1. The death of the individual,

2. Discharge or release from active duty or Selected Reserve for a medical condition which pre-existed the service of the individual and was not service connected,

3. Discharge or release from active duty or Selected Reserve for hardship as determined by the Secretary of the Military Department concerned,

4. Discharge or release from active duty or Selected Reserve for a physical or mental condition, not a disability, that did not result from the individual's own willful misconduct, but did interfere with the performance of duty.

i. Procedures. All requests and transactions for individuals who remain in the Armed Forces will be completed through the Transferability of Educational Benefits (TEB) Web application at https://www.dmdc.osd.mil/TEB/. The TEB Users Manual will provide instruction for enrollment; verification; and additions, changes, and revocations. Modifications or revocations after separation from the Armed Forces will be accomplished with the Department of Veterans Affairs.

j. Regulations. The Secretaries of the Military Departments shall prescribe regulations for the purposes of administering the transferability of unused education entitlements to family members in accordance with this DTM. Such regulations shall specify:

(1) The manner of verifying and documenting the additional service commitment, if any, under paragraph 3.a of this attachment, to be authorized to transfer education benefits.

(2) The manner of determining eligibility to authorize the transfer of education benefits as allowed in paragraphs 3.a.(1), 3.a.(2), or 3.a.(3) of this attachment.

4. EFFECTIVE DATE. Policies and procedures under this issuance become effective on August 1, 2009, the effective date of the Post-9/11 GI Bill.

ATTACHMENT 3

ELIGIBILITY FOR POST-9/11 GI BILL

The DVA is responsible for determining eligibility for education benefits under the Post-9/11 GI Bill. Generally, to be eligible for the Post-9/11 GI Bill, individuals must serve on active duty on or after September 11, 2001, for at least 30 continuous days with a discharge due to a service-connected disability; or an aggregate period ranging from 90 days to 36 months or more. Benefits under the Post-9/11 GI Bill are based on a percentage, as determined by a Service Member's length of qualifying active duty service, as shown in Table 1.

Table 1: Maximum Benefits Payable

Member Serves	Percentage of Maximum Benefit Payable
At least 36 months	100
At least 30 continuous days on active duty and discharged due to service-connected disability	100
At least 30 months, but less than 36 months	90
At least 24 months, but less than 30 months	80
At least 18 months, but less than 24 months*	70
At least 12 months, but less than 18 months*	60
At least 6 months, but less than 12 months*	50
At least 90 days, but less than 6 months*	40

* If aggregate service is less than 24 months, initial entry training does not count as qualifying active duty.

ATTACHMENT 4

ADDITIONAL REPORTING REQUIREMENTS

Table 2: Data Elements from References (d) and (e) Relevant to this DTM

Field	Data Element Name	Description	References
947-954	d. Initial Entry Training End Calendar Date	The date a member completed initial entry training, including skill training. Format: YYYYMMDD. If not applicable or unknown, report all zeros.	
293	b. Commissioned Officer Accession Program Source Code	The code that represents the accession program by which a member first obtained commissioned officer, other than commissioned warrant officer, status (also known as Source of Initial Commission.) Applicable only to commissioned officers, other than commissioned warrant officers. If not applicable or unknown, report Z. G ROTC scholarship program under section 2107(b) of Reference (b). R ROTC	See Reference (d) for additional data elements.

Table 2: Data Elements from References (d) and (e) Relevant to this DTM

		scholarship program under section 2107(a) of Reference (b).	
955-971	Active Duty Loan Repayment Incentive Program		
955-962	a. Active Duty Loan Repayment Incentive Program Eligibility Effective Date	The beginning date of a Service member's commitment based on eligibility for an educational incentive under the Active Duty Loan Repayment Incentive Program. Format: YYYYMMDD. If not applicable or unknown, report all zeros.	
963	b. Active Duty Loan Repayment Incentive Program Educational Type Code	The type of active duty educational incentive for a Service member, who is appointed, enlists, reenlists, affiliates, or extends in an Active Duty Loan Repayment Incentive Program. If not applicable or unknown, report Z. A Educational loan repayment assistance	Chapter 109 of Reference (b)
964-971	c. Active Duty Loan Repayment	The completion date of a Service	

Table 2: Data Elements from References (d) and (e) Relevant to this DTM

	Incentive Program Eligibility Completion Date	member's commitment based on eligibility for an educational incentive under the Active Duty Loan Repayment Incentive Program. Format: YYYYMMDD. If not applicable or unknown, report all zeros.	
972-975	Post-9/11 GI Bill Incentive Program		
972-973	a. Post-9/11 GI Bill Incentive Kicker Rate Code	The code that represents the monetary level of a Post-9/11 GI Bill kicker incentive for which a member is entitled upon enlistment or affiliation. If not applicable or unknown, report ZZ.	See Table 3 for a list of values
974-975	b. Post-9/11 GI Bill Reenlistment Incentive Kicker Rate Code	The code that represents the monetary level of a Post-9/11 GI Bill reenlistment kicker incentive for which a member is entitled. If not applicable or unknown, report ZZ.	See Table 4 for a list of values

Table 3: Enlistment and Affiliation Kicker Codes*

CODE	RATE	OTHER INFORMATION
D2	$150	Effective 1 August 2009. Requires a 2-year active duty service agreement.
D3	$150	Effective 1 August 2009. Requires a 3-year active duty service agreement.
D4	$150	Effective 1 August 2009. Requires a 4-year active duty service agreement.
D5	$150	Effective 1 August 2009. Requires a 5-year active duty service agreement.
D6	$150	Effective 1 August 2009. Requires a 6-year active duty service agreement.
D9	$150	Effective 1 August 2009. Requires a 4-year service agreement: 2 years on active duty plus 2 years in the Selected Reserve.
E2	$250	Effective 1 August 2009. Requires a 2-year active duty service agreement.
E3	$250	Effective 1 August 2009. Requires a 3-year active duty service agreement.
E4	$250	Effective 1 August 2009. Requires a 4-year active duty service agreement.
E5	$250	Effective 1 August 2009. Requires a 5-year active duty service agreement.
E6	$250	Effective 1 August 2009. Requires a 6-year active duty service agreement.
E9	$250	Effective 1 August 2009. Requires a 4-year service agreement: 2 years on active duty plus 2 years in the Selected Reserve.
F2	$350	Effective 1 August 2009. Requires a 2-year active duty service agreement.
F3	$350	Effective 1 August 2009. Requires a 3-year active duty service agreement.
F4	$350	Effective 1 August 2009. Requires a 4-year active duty service agreement.
F5	$350	Effective 1 August 2009. Requires a 5-year active duty service agreement.
F6	$350	Effective 1 August 2009. Requires a 6-year active duty service agreement.
F9	$350	Effective 1 August 2009. Requires a 4-year service agreement: 2 years on active duty plus 2 years in the Selected Reserve.
G2	$450	Effective 1 August 2009. Requires a 2-year active duty service

Table 3: Enlistment and Affiliation Kicker Codes*

		agreement.
G3	$450	Effective 1 August 2009. Requires a 3-year active duty service agreement.
G4	$450	Effective 1 August 2009. Requires a 4-year active duty service agreement.
G5	$450	Effective 1 August 2009. Requires a 5-year active duty service agreement.
G6	$450	Effective 1 August 2009. Requires a 6-year active duty service agreement.
G9	$450	Effective 1 August 2009. Requires a 4-year service agreement: 2 years on active duty plus 2 years in the Selected Reserve.
H2	$550	Effective 1 August 2009. Requires a 2-year active duty service agreement.
H3	$550	Effective 1 August 2009. Requires a 3-year active duty service agreement.
H4	$550	Effective 1 August 2009. Requires a 4-year active duty service agreement.
H5	$550	Effective 1 August 2009. Requires a 5-year active duty service agreement.
H6	$550	Effective 1 August 2009. Requires a 6-year active duty service agreement.
H9	$550	Effective 1 August 2009. Requires a 4-year service agreement: 2 years on active duty plus 2 years in the Selected Reserve.
J2	$650	Effective 1 August 2009. Requires a 2-year active duty service agreement.
J3	$650	Effective 1 August 2009. Requires a 3-year active duty service agreement.
J4	$650	Effective 1 August 2009. Requires a 4-year active duty service agreement.
J5	$650	Effective 1 August 2009. Requires a 5-year active duty service agreement.
J6	$650	Effective 1 August 2009. Requires a 6-year active duty service agreement.
J9	$650	Effective 1 August 2009. Requires a 4-year service agreement: 2 years on active duty plus 2 years in the Selected Reserve.
K2	$750	Effective 1 August 2009. Requires a 2-year active duty service agreement.
K3	$750	Effective 1 August 2009. Requires a 3-year active duty service agreement.
K4	$750	Effective 1 August 2009. Requires a 4-year active duty service

Table 3: Enlistment and Affiliation Kicker Codes*

		agreement.
K5	$750	Effective 1 August 2009. Requires a 5-year active duty service agreement.
K6	$750	Effective 1 August 2009. Requires a 6-year active duty service agreement.
K9	$750	Effective 1 August 2009. Requires a 4-year service agreement: 2 years on active duty plus 2 years in the Selected Reserve.
L2	$850	Effective 1 August 2009. Requires a 2-year active duty service agreement.
L3	$850	Effective 1 August 2009. Requires a 3-year active duty service agreement.
L4	$850	Effective 1 August 2009. Requires a 4-year active duty service agreement.
L5	$850	Effective 1 August 2009. Requires a 5-year active duty service agreement.
L6	$850	Effective 1 August 2009. Requires a 6-year active duty service agreement.
L9	$850	Effective 1 August 2009. Requires a 4-year service agreement: 2 years on active duty plus 2 years in the Selected Reserve.
M2	$950	Effective 1 August 2009. Requires a 2-year active duty service agreement.
M3	$950	Effective 1 August 2009. Requires a 3-year active duty service agreement.
M4	$950	Effective 1 August 2009. Requires a 4-year active duty service agreement.
M5	$950	Effective 1 August 2009. Requires a 5-year active duty service agreement.
M6	$950	Effective 1 August 2009. Requires a 6-year active duty service agreement.
M9	$950	Effective 1 August 2009. Requires a 4-year service agreement: 2 years on active duty plus 2 years in the Selected Reserve.

* This will be the same coding structure for Reference (e).

Table 4: Reenlistment Kicker Codes*

CODE	RATE	OTHER INFORMATION
N2	$100	Effective 1 August 2009. Requires a 2-year active duty service agreement.
N3	$200	Effective 1 August 2009. Requires a 3-year active duty service agreement.
N4	$300	Effective 1 August 2009. Requires a 4-year active duty service agreement.

* This will be the same coding structure for Reference (e).

GLOSSARY

DEFINITIONS

active duty. For the Post-9/11 GI Bill, the term "active duty" has the meanings as follows (subject to the limitations specified in sections 3002(6) and 3311(b)) of Reference (a):

In the case of members of the regular components of the Armed Forces, the meaning given such term in section 101(21)(A) of Reference (a).

In the case of members of the Reserve Components of the Armed Forces, service on active duty under a call or order to active duty under section 688, 12301(a), 12301(d), 12301(g), 12302, or 12304 of Reference (b).

EATP. The Educational Assistance for Persons Enlisting for Active Duty program, chapter 106A (formerly chapter 107) of Reference (b).

entry level and skill training

In the case of members of the Army, Basic Combat Training, Advanced Individual Training, which includes members attending One Station Unit Training (OSUT).

In the case of members of the Navy, Recruit Training (or Boot Camp) and Skill Training (or so-called "A" School).

In the case of members of the Air Force, Basic Military Training and Technical Training.

In the case of members of the Marine Corps, Recruit Training and Marine Corps Training (or School of Infantry Training).

In the case of members of the Coast Guard, Basic Training.

family member. For the purpose of this DTM, a spouse or child enrolled in DEERS.

kickers. Supplemental educational assistance paid to an eligible Service member besides the basic educational assistance under section 3316 of Reference (a).

institution of higher learning (IHL). A training institution as defined in section 3452(f) of Reference (a), and approved for purposes of chapter 30 of Reference (a), (including approval by the State approving agency concerned).

MGIB. The All-Volunteer Force Education Assistance Program, chapter 30 Reference (a)

MGIB-SR. The Educational Assistance for Members of the Selected Reserve program, chapter 1606 of Reference (b).

member of the Armed Forces. For the purpose of this DTM, those individuals serving on active duty or in the Selected Reserve. Does not include other members of the Ready Reserve (such as the Individual Ready Reserve, standby Reserve, or retired members of the Armed Forces.)

Post-9/11 GI Bill. The Post-9/11 Educational Assistance Program, chapter 33 of Reference (a).

REAP. The Reserve Educational Assistance Program, chapter 1607 of Reference (b).

Secretary of the Military Department concerned. For a member of the Army, the Navy, the Air Force, the Marine Corps, and the Coast Guard when it is operating as a Service of the Department of the Navy, the term means the Secretary of the Military Department with jurisdiction over that Service Member. For a member of the Coast Guard, when the Coast Guard is operating as a Service of the DHS, the term means, "the Secretary of Homeland Security has jurisdiction over that Service member."

LIST OF COORDINATING OFFICIALS FOR Directive-Type Memorandum 09-003
"Post-9/11 GI Bill"

Under Secretary of Defense, Comptroller/Chief Financial Officer	Robert F. Hale	February 26, 2009
Assistant Secretary of Defense for Legislative Affairs	Christian P. Marrone Acting	February 17, 2009
General Counsel, DoD	Paul S. Koffsky Deputy General Counsel (Personnel and Health Policy)	March 30, 2009
Inspector General, DoD	Donald M. Horstman Deputy Inspector General (Policy and Oversight)	March 3, 2009
Director of Administration and Management	Craig H. Glassner Director, ESD, for Michael L. Rhodes Acting Director	February 26, 2009
Secretary of the Army	Danny G. I. Pummill Director Operations Acting Principal Deputy Assistant Secretary (Manpower and Reserve Affairs)	March 12, 2009
Secretary of the Navy	Harvey C. Barnum, Jr. Acting Assistant Secretary (Manpower and Reserve Affairs)	March 4, 2009
Secretary of the Air Force	Craig W. Duehring Assistant Secretary (Manpower and Reserve Affairs)	March 9, 2009
Chairman of the Joint Chiefs of Staff	MajGen W. E. Gaskin, USMC Vice Director, Joint Staff	March 9, 2009

U.S. Coast Guard

CAPT Anthony R. Gentilella
Chief
Office of Military Personnel
Acting CG-12

April 13, 2009

Deleted: February 26