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3.A. Enlistment Bonus (EB) Program

3.A.1. General

The Enlistment Bonus (EB) program is an incentive to attract qualified personnel to critical skills or ratings to help meet the Coast Guard's recruiting goals. This program applies to new enlistments. The EB is authorized under Title 37 U.S.C., Section 309.

3.A.2. Glossary of Terms

1. Critical rating. A rating that is understaffed, is projected to be understaffed in the future, or requires an inordinate amount of training to achieve rating strength. The shortages are the result of the Service's inability to attract and retain personnel in the rating.
2. Non-rate Bonus. EB authorized to new recruits without a guaranteed affiliation with a Class "A" school or "Striker" program.
3. Obligated Service. All periods of military service covered by a signed agreement in the form of an Enlistment Contract between Coast Guard members and the U. S. Coast Guard in which members agree to serve for designated periods of time. In order to receive the EB, members must agree to enlist for at least four years of active duty in a skill determined as critical.
4. Unearned Bonus. A portion of the Enlistment Bonus already paid to a member who subsequently does not complete the service obligation.

Example: A member enlists for four years and receives a \$2,000 payment. If the member is subsequently discharged due to misconduct after serving only two years, the member has earned only two years' worth of the Enlistment Bonus (\$1,000); the second two years' worth of Enlistment Bonus (\$1,000) is unearned and may be recouped.

3.A.3. Policy

1. As needs of the Service dictate, Commandant (G-WPM) will convene a panel to determine which ratings are critical, may be placed on the guaranteed Class "A" school list, and are designated eligible for an Enlistment Bonus (EB).
2. Enlistment Bonuses are linked to a member's recruitment and affiliation with a critical rating by attending a guaranteed Class "A" school or participating in a guaranteed "Striker" program in that rating or, for prior service personnel who already have the qualifying skill, agreeing to enlist in the designated rating for a minimum of four years. An additional amount may be offered for the member to accept an enlistment of six years. This program is not a substitute for a Selected Reenlistment Bonus (SRB). Former and current Coast Guard members (active or reserve) are not normally eligible for an enlistment bonus, unless needs of the Service dictate otherwise.
3. For those ratings for which there is no Class "A" school and an Enlistment Bonus is established, a member may receive the bonus by affiliating upon reenlistment, or while at recruit training, with the rating through the "Striker" program established in  Article 5.E. In these cases, special arrangements shall be made by Commander (CGPC-epm) to assign members to appropriate commands with viable "Striker" program.
4. A non-rate EB may be authorized to new recruits without a guaranteed affiliation with a Class "A" school or "Striker" program. Former and current Coast Guard members (active or reserve) are not normally eligible to receive a non-rate EB.
 - a. Members who select the college fund at the time of enlistment are not eligible to receive a non-rate EB.
 - b. Members who are authorized a non-rate EB upon enlisting and then affiliate with a critical rating while at recruit training will receive the larger of the two enlistment bonuses. For example, if a recruit receives a \$3,000 non-rate EB, then while at recruit training affiliates with a rating that is authorized an enlistment bonus of \$2,000, that recruit would continue to receive the \$3,000 non-rate EB. However, if the recruit receives a non-rate EB of \$2,000, then affiliates with a rating that is authorized an EB of \$15,000, then the member would receive the \$15,000 EB.
5. A member may receive only one of the following benefits or incentives: (1) Coast Guard College Fund or (2) Enlistment Bonus Program. Receiving an Enlistment Bonus does not affect eligibility for educational benefits pursuant to the Montgomery G.I. Bill (MGIB). A Selective Reenlistment Bonus (SRB) may not be paid for the same period of service for which an Enlistment Bonus (EB) is paid.

3.A.4. Eligibility Criteria

1. To qualify for the Enlistment Bonus Program, members must:
 - a. Meet standard enlistment qualification criteria;
 - b. Qualify for and agree to affiliate with a selected rating or designated critical skill and agree to serve an initial active duty enlistment for a minimum of 4 years;
 - c. Not participate in the Coast Guard College Fund. Once a member chooses to participate in the Enlistment Bonus, he or she cannot change over to the College Fund.
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3.A.5. Loss of Eligibility and Recoupment

1. All paid but unearned bonuses, as defined by  Article 3.A.2., will be recouped on a prorated basis.
2. Members who are disenrolled from basic training lose their eligibility to receive the enlistment bonus.
3. Members who are disenrolled from the qualifying Class "A" school or assigned "Striker" program lose their eligibility to receive the bonus. Enlistment Bonuses will not be recouped for members who are disenrolled under the conditions established in  Article 3.A.5.6 or who do not acquire the skill due to unforeseen service actions (e.g., disestablishing the member's rating).
4. Members lose their eligibility to receive EB payments on the date they are no longer qualified to serve in the rating for which the bonus was authorized. Additionally, all paid but unearned Enlistment Bonuses shall be recouped on a prorated basis. A member will be considered not technically qualified to receive the bonus if:
 - a. The member no longer serves in the rating for which the bonus was authorized;
 - b. The member's rating designator is removed; or
 - c. Current and future assignment in that military specialty is precluded.
5. Unearned bonuses shall also be recouped if:
 - a. The member is unable to perform the duties of the rating for which the bonus was paid due to injuries caused by his or her own misconduct;
 - b. The member is unable to perform the duties of the rating for which the bonus was paid as a result of a loss of security clearance due to his or her fault; or

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- c. The member refuses to perform the duties of the rating for which the bonus was paid.
6. Members who are discharged or change ratings prior to completing the period of service for which they were paid an enlistment bonus shall have a prorated share of all paid but unearned bonus recouped except:
 - a. Members involuntarily discharged for the Convenience of the Government in connection with a reduction in force;
 - b. Members who are separated or retired for physical disability, illness, injury, or other impairment incurred in the line of duty and not due to misconduct;
 - c. Members who receive a dependency or hardship discharge;
 - d. Members discharged early for the purpose of immediate reenlistment, provided they reenlist in the eligible rating and the reenlistment term is for a period longer than the obligated service remaining in the period for which an Enlistment Bonus was paid. For example, if a member separates before his or her normal end of enlistment to immediately reenlist, the money will not be recouped if the member extends or reenlists for a period at least longer than the amount of time the member had remaining at separation.
 - e. Members are required to change ratings based on the needs of the Service.
7. Personnel no longer classified or assigned to a general petty officer billet due to humanitarian reassignment, loss of security clearance not due to the member's fault, injury or illness through no fault of their own, will be entitled to their full bonus.
8. Members placed on weight probation in accordance with Allowable Weight Standards for Coast Guard Military Personnel,  COMDTINST M1020.8 (series), shall have any unpaid Enlistment Bonus suspended until they comply with the Coast Guard's allowable weight standards.

3.A.6. Payment Procedures

1. The procedures to initiate payment of the Enlistment Bonus are published in the ☞ SDA-II User Manual, HRSICINST M5231.2 (series).
2. General Payment Procedures. The Enlistment Bonus will be paid as following:
 - a. For members eligible to receive the non-rate EB, the bonus will be paid in lump sum after successful completion of recruit training. (☞ Article 3.A.9. Annex T.1.)
 - b. For non-prior service members, the bonus will be paid in lump sum after successful completion of Class "A" school. (☞ Article 3.A.9. Annex T.)
 - c. For prior service members who already have the qualifying skill, the bonus will be paid in lump sum upon reporting to their first unit assignment.
 - d. For members entering a bonus-eligible rating through the "Striker" program, the entire bonus will be paid upon advancement to E-4. (☞ Article 3.A.9. Annex T.2.)

3.A.7. Recoupment Procedures

1. The procedures to initiate recoupment of the Enlistment Bonus are published in the ☞ Personnel and Pay Procedures Manual, HRSIC M1000.2 (series) and the ☞ SDA-II User Manual, HRSICINST M5231.2 (series).
2. General Recoupment Procedures. When a member is no longer eligible for the Enlistment Bonus, HRSIC will recoup paid but unearned bonus portions based on the effective date documented by the member's command.
3. Recoupment examples:
 - a. A non-prior service member enlisted for 4 years (48 months) on 20 September 2000 for an "A" school, which has a \$15,000 bonus. On graduation from the "A" school on 1 August 2001, the member was paid \$15,000. The member served at his unit for three months and was discharged due to misconduct on 5 October 2001. Time not served is 2 years, 11 months and 15 days. The amount of Enlistment Bonus recouped would be \$11,093.75 based on $(\$15,000/48 \text{ months} = \$312.50 \text{ per month} \times 35 \text{ months}) + (\$312.50/30 \text{ days} = \$10.4166 \text{ per day} \times 15 \text{ days})$.
 - b. A prior service member enlisted for 4 years (48 months) on 20 October 2001 with a \$2,000 bonus. On entry, the member was paid a \$2,000 bonus. Member was separated from the service due to misconduct on 1 January 2002. Time not served is 3 years, 9 months and 19 days. The amount of Enlistment Bonus recouped would be \$1,901.39 based on $(\$2,000/48 \text{ mos} = \$41.6666 \text{ per month} \times 45 \text{ months}) + (41.6666/30 \text{ days} = \$1.3888 \text{ per day} \times 19 \text{ days})$.

3.A.8. Responsibilities

1. Commandant (G-WPM):
 - a. Oversee the Enlistment Bonus Program, policy and resources;
 - b. Promulgate and maintain a list of selected critical ratings eligible for Enlistment Bonuses;
 - c. As Service needs require, convene a panel to recommend the number of initial EB quotas that may be offered and associated bonus amounts. Upon approval of the panel's recommendations, provide a listing of authorized quotas and bonus amounts to Commanding Officer, CGRC, and other appropriate offices. Based on Service needs, Commandant (G-WPM-1) may make periodic adjustments to the initially recommended quota allocations and bonus amounts.
2. Commandant (G-WP-1): As needs of the Service require, review the list of ratings designated as critical for the purposes of this program and recommend which ratings should be considered by the Enlistment Bonus Panel for addition to or deletion from the Enlistment Bonus program.
3. Commanding Officer, Human Resources Service and Information Center (HRSIC): Establish and maintain a system for paying and recouping enlistment bonuses and publish these procedures in the  Personnel and Pay Procedures Manual, HRSIC M1000.2(series) and  SDA-II User Guide, HRSICINST 5231.2 (series).
4. Commander, Coast Guard Personnel Command:
 - a. Apportion guaranteed "A" schools, including those for which an Enlistment Bonus has been authorized by Commandant (G-WPM), based on the availability of Class "A" school quotas listed in the Convening Schedule for Coast Guard Class "A" and "C" Resident Exportable Training Courses, COMDTNOTE 1540. Commander (CGPC-epm) will balance the number of guaranteed Class "A" school quotas eligible for the Enlistment Bonus program with the number of quotas available to personnel already on the school waiting lists. Commander (CGPC-epm) will publish Quarterly allocations seven days before the end of each Quarter, and update as necessary.
 - b. For members recruited into an eligible "Striker" program, upon graduation from recruit training, Commander (CGPC-epm) shall assign members PCS to an appropriate command with a viable "Striker" program in that rating. Also, Commander (CGPC-epm) will coordinate assignments as needed to ensure receiving commands have the capacity to accommodate Strikers within the established personnel allowance.

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5. Commanding Officer, Coast Guard Recruiting Command (CGRC):
 - a. Design and execute a marketing plan for the Coast Guard Enlistment Bonus Program as part of an overall effort to accomplish Coast Guard recruiting missions and goals.
 - b. Ensure eligible members' enlistment contracts set forth the terms under which enlistment bonuses may be paid and recouped by completing Annex T for each recipient of an Enlistment Bonus.
 - c. Ensure a member enlisted under the Enlistment Bonus program is not also enlisted under the College Fund incentive program.
 - d. Provide by the fifth (5th) day of each month, a list of personnel recruited with an Enlistment Bonus. Provide each recipient's name, social security number, enlistment and shipping date, rating affiliation (e.g. guaranteed Class "A" school, guaranteed "Striker" program, or prior service with qualifying skills), and other pertinent identifying data. If a guaranteed Class "A" school, provide course convening date to which assigned. The original report will be submitted to Commander (CGPC-epm) with copies to Commandant (G-WPM), (G-WP-1), HRSIC (MAS), TRACEN Cape May (apr) and TRACEN Yorktown (PERSRU).
 - e. Recommend reallocation of funds budgeted for the EB program to meet changes to the ratings designated eligible to receive EBs.
6. Personnel Reporting Units (PERSRUS) at Training Center Cape May and Class "A" Schools shall ensure appropriate PMIS/JUMPS entries are made to pay Enlistment Bonuses.
7. Commands receiving members under the Enlistment Bonus as a guaranteed "Striker."
 - a. Ensure member satisfies all requirements of the "Striker" program in accordance with  Article 5.E. Members failing to make satisfactory progress may be disenrolled from the "Striker" program using standard criteria for unit "Striker" program administration and will not receive a bonus. However, this period may not exceed two years from the date member arrived at the unit.
 - b. If the command disenrolls a member from the unit "Striker" program, a message report with relevant dates and basis of disenrollment must be sent to Commander (CGPC-epm) with copy to Commandant (G-WPM),(G-WP-1), and HRSIC (MAS).

3.A.9. Forms/Reports

The Enlistment Bonus Agreements (Annexes T, T.1 and T.2) document the eligibility criteria and conditions under which an Enlistment Bonus is paid. It is the source document that is used to implement pay actions through PMIS/JUMPS.

<p>ANNEX T ENLISTMENT BONUS AGREEMENT NON-PRIOR SERVICE WITH GUARANTEED "A" SCHOOL OR PRIOR SERVICE WITH QUALIFYING SKILL</p>
<p>Privacy act statement Authority: Title 37, U.S.C., Section 323</p>
<p>Purpose: To provide information necessary for the approval Authority to determine if applicant meets all requirements to receive an enlistment bonus.</p>
<p>Routine uses: For processing activities and approval authority to determine if applicant meets all eligibility requirements for the program. Use of SSN is necessary to make positive identification of individual records.</p>
<p>Disclosure is voluntary: If the applicant does not provide the information, however, no further action can be taken on the request and all further processing terminates.</p>
<p>An original and three copies of this form shall be prepared. It will become an Annex to the Enlistment/Reenlistment Document, Armed Forces of the United States (DD-4).</p>
<p>Recruiting Office: _____ Date: _____</p>
<p>Prior to enlisting in the United States Coast Guard and receiving an Enlistment Bonus, I, _____ understand that:</p>
<ol style="list-style-type: none"> 1. I have been offered an Enlistment Bonus of \$ _____ to affiliate with the _____ rating. In order to affiliate with this rating, I have either been offered a guaranteed Class "A" school or I am a prior service member who is already qualified in the skill/rating in accordance with eligibility criteria established by the Coast Guard. 2. I agree to enlist for a minimum of four (4) years in the rating for which the bonus is paid. Therefore, if I am a prior service member with the qualifying skill or specialty, I will enlist in the eligible rating for at least four years or if I am a non-prior service member I will be assigned to Class "A" school for the eligible rating identified above. 3. The Bonus will be paid in lump sum. If I am a non-prior service member, the enlistment bonus will be paid after successful completion of Class "A" school. If I am a prior service member who already has the qualifying skill, the bonus will be paid upon reporting to my first unit assignment. 4. The commanding officer of the training center to which the Class "A" School is attached may revoke this guarantee should I fail to progress satisfactorily during Class "A" School. Failure to progress satisfactorily is interpreted to mean failure to complete Class "A" School training in accordance with established schedules due to academic,

adaptability, or misconduct reasons. This guarantee is also contingent on my meeting all physical standards applicable for attending the Class "A" school.

5. Should I be convicted of a serious violation of the Uniform Code of Military Justice, this guarantee will be revoked.
6. Should I be disenrolled from the school identified in this statement of understanding for academic failure or misconduct, I will be ineligible to receive the bonus, I will not be guaranteed assignment to another school, and I will be required to complete my 4 years active duty commitment. If I am disenrolled from the aforementioned school for any of the reasons contained in this statement of understanding, I will not necessarily be precluded from applying for future school assignment per current regulations and policies.
7. I will become ineligible for continued payment of my Enlistment Bonus if I am no longer qualified in, or serving in, the rating identified in paragraph one (1). Further, all paid but unearned bonus will be recouped in these cases. I will be considered not technically qualified in the Bonus eligible rating when, for any reason within my control:
 - a. I am no longer serving in the rating;
 - b. My rating designator is removed; or
 - c. My current or future assignment in the military specialty is precluded.
8. I understand that if while at training, I go into an overweight status, upon graduation, I will be ineligible for bonus payments until such time I am within published weight standards.
9. Any paid but unearned bonuses shall also be recouped when:
 - a. I am unable to perform the duties of the rating for which the bonus was paid as result of injuries caused by my own fault;
 - b. I am unable to perform the duties of the rating for which the bonus was paid as a result of a loss of security clearance due to my own fault;
 - c. I refuse to perform the duties of the rating for which the bonus was paid.
10. If I am separated from the active duty Coast Guard, or change ratings, prior to completing the period of service for which the Enlistment Bonus was paid, a prorated share of all paid but unearned bonus shall be recouped except under the following circumstances:
 - a. I am involuntarily discharged for reason of Convenience of the Government in connection with a reduction in force;
 - b. I am separated or retired by reason of physical disability, illness, injury, or other impairment incurred in the line of duty and not due to misconduct;
 - c. I receive a hardship discharge;

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- d. I am discharged early for the purpose of immediate reenlistment, provided the reenlistment is in the eligible rating identified in this statement of understanding and the term of reenlistment is for a period greater than the obligated service remaining to be served for payment of the Enlistment Bonus.
- e. I am required to change ratings based on the needs of the Service.

Signature of Enlisting Officer

Signature of Enlistee (full name)

Date: _____

Copy: Enlistee

ANNEX T.1
ENLISTMENT BONUS AGREEMENT (NON-RATE BONUS)

Privacy act statement

Authority: Title 37, U.S.C., Section 323

Purpose: To provide information necessary for the approval Authority to determine if applicant meets all requirements to receive an enlistment bonus.

Routine uses: For processing activities and approval authority to determine if applicant meets all eligibility requirements for the program. Use of SSN is necessary to make positive identification of individual records.

Disclosure is voluntary: If the applicant does not provide the information, however, no further action can be taken on the request and all further processing terminates.

An original and three copies of this form shall be prepared. It will become an Annex to the Enlistment/Reenlistment Document, Armed Forces of the United States (DD-4).

Recruiting Office: _____ Date: _____

Prior to enlisting in the United States Coast Guard and receiving an Enlistment Bonus, I, _____ understand that:

1. I have been offered an Enlistment Bonus of \$ _____ to enter the Coast Guard with no guaranteed "A" school or "Striker" program affiliation.
2. I agree to enlist for four (4) years for which the bonus is paid. This bonus CANNOT be used in conjunction with the 2 and 3 year Enlistment Program.
3. Commanding Officer, Training Center Cape May, may revoke this guarantee should I fail to progress satisfactorily during recruit training. Failure to progress satisfactorily is interpreted to mean failure to complete recruit training in accordance with established schedules due to academic, adaptability, or misconduct reasons.

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4. Should I be convicted of a serious violation of the Uniformed Code of Military Justice, this guarantee will be revoked.
5. I understand that this non-rate enlistment bonus is NOT authorized for prior Coast Guard members.
6. The bonus shall be payable in one installment upon successful completion of recruit training.
7. Any paid but unearned bonuses shall be recouped when:
 - a. I am unable to perform the duties of the skill for which the bonus was paid as result of injuries caused by my own misconduct;
 - b. I am unable to perform the duties of the rating for which the bonus was paid as a result of a loss of security clearance due to my own misconduct;
 - c. I refuse to perform the duties of the rating for which the bonus was paid.
8. The bonus will not be recouped if I am selected for and attend a Class "A" School.
9. If I am separated from the active duty Coast Guard, prior to completing the period of service for which the Enlistment Bonus was paid, a prorated share of all paid but unearned bonus shall be recouped except under the following circumstances:
 - a. I am involuntarily discharged for reason of Convenience of the Government in connection with a reduction in force;
 - b. I am separated or retired by reason of physical disability, illness, injury, or other impairment incurred in the line of duty and not due to misconduct;
 - c. I receive a hardship discharge;
 - d. I am discharged early for the purpose of immediate reenlistment, provided the reenlistment is in the eligible rating identified in this statement of understanding and the term of reenlistment is for a period greater than the obligated service remaining to be served for payment of the Enlistment Bonus.

Signature of Enlisting Officer

Signature of Enlistee (full name)

Date: _____

Copy: Enlistee

ANNEX T.2
ENLISTMENT BONUS AGREEMENT
STRIKER BONUS

Privacy act statement

Authority: Title 37, U.S.C., Section 323

Purpose: To provide information necessary for the approval Authority to determine if applicant meets all requirements to receive an enlistment bonus.

Routine uses: For processing activities and approval authority to determine if applicant meets all eligibility requirements for the program. Use of SSN is necessary to make positive identification of individual records.

Disclosure is voluntary: If the applicant does not provide the information, however, no further action can be taken on the request and all further processing terminates.

An original and three copies of this form shall be prepared. It will become an Annex to the Enlistment/Reenlistment Document, Armed Forces of the United States (DD-4).

Recruiting Office: _____ Date: _____

Prior to enlisting in the United States Coast Guard I,

_____,
understand that:

1. I have been offered an Enlistment Bonus of \$ _____ to enter the Coast Guard and prior to completion of recruit training, agree to affiliate or strike with one of the following critical ratings: (Recruiters, check all ratings the applicant is qualified.)

- | | | | |
|-----------------------------|-----------------------------|-----------------------------|-----------------------------|
| <input type="checkbox"/> BM | <input type="checkbox"/> EM | <input type="checkbox"/> MK | <input type="checkbox"/> SK |
| <input type="checkbox"/> DC | <input type="checkbox"/> FS | <input type="checkbox"/> QM | <input type="checkbox"/> YN |

If any of the critical rating above is available, and I am fully qualified, I will be assigned to a unit where I can begin the "Striker" program.

2. The bonus will be paid in one lump sum payment upon my advancement to E-4.

3. I agree to enlist for a minimum of four (4) years to receive this bonus. I understand that this bonus is not authorized for enlistments of less than four years.

4. Commanding Officer, Training Center Cape May, may revoke this guarantee should I fail to progress satisfactorily during recruit training. Failure to progress satisfactorily is interpreted to mean failure to complete recruit training in accordance with established schedules due to academic, adaptability, or misconduct reasons.

5. Should I fail to make satisfactory progress within two years from the date I arrived at my unit, I may be disenrolled from the "Striker" program using standard criteria for unit "Striker" program administration and will not receive a bonus.

6. Should I be convicted of an offense as a result of Non-Judicial Punishment or Court

Martial, this bonus will be revoked.

7. I understand that should I be disenrolled from the Striker program for misconduct or for other reasons contained in this statement of understanding:

- a. I will not be eligible to receive a bonus.
- b. I will not be guaranteed to strike another rating.
- c. I will be required to complete my _____ years active duty commitment.
- d. I may apply for future Class "A" school assignment per current regulations and policies.

8. I understand that I will become ineligible for continued payment of my Enlistment Bonus if I am no longer qualified in, serving in, the rating for which the bonus was paid. Further, all paid but unearned bonus will be recouped in these cases. I will be considered not technically qualified for the bonus eligible rating when, for any reason within my control:

- a. I am no longer serving in the rating.
- b. My rating designator is removed.
- c. My current or future assignment in the military specialty is precluded.

9. Any paid but unearned bonuses shall also be recouped when:

- a. I am unable to perform the duties of the rating for which the bonus was paid as a result of injuries caused by my own fault.
- b. I am unable to perform the duties of the rating for which the bonus was paid as a result of a loss of security clearance due to my own fault.
- c. I refuse to perform the duties of the rating for which the bonus was paid.

10. If I am separated from the active duty Coast Guard, prior to completing the period of service for which the Enlistment Bonus was paid, a prorated share of all paid but unearned bonus shall be recouped except under the following circumstances:

- a. I am involuntarily discharged for reason of Convenience of the Government in connection with a reduction in force.
- b. I am separated or retired by reason of physical disability, illness, injury, or other impairment incurred in the line of duty and not due to misconduct.
- c. I receive a hardship discharge.
- d. I am discharged early for the purpose of immediate reenlistment, provided the reenlistment is in the eligible rating identified in this statement of understanding and the term of reenlistment is for a period greater than the obligated service remaining to be served for payment of the Enlistment Bonus.
- e. I am required to change ratings based on the needs of the Service.

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_____ Signature of Enlisting Officer	_____ Signature of Enlistee (full name)
Date: _____	
Copy: Enlistee	