Module 3: Requesting Tuition Assistance (TA)

Soldier Quick Start Training
GoArmyEd

Module 3
Requesting Tuition Assistance (TA)
Overview

Requesting TA

This module is intended to provide you with a checklist for using TA through GoArmyEd. You can enroll in postsecondary classes online through GoArmyEd and your TA benefits will be applied automatically in accordance with Army Education Policy in AR 621-5.

This module includes nine topics:
Topic 1: TA Overview
Topic 2: TA Request Requirements
Topic 3: Class Enrollment Guide for Requesting TA
Topic 4: Register for a Class Directly in GoArmyEd
Topic 5: School Admissions and Rejections
Topic 6: Process a Request TA Form in GoArmyEd
Topic 7: TA Request Rejection
Topic 8: Costs Exceed TA Amount
Topic 9: Summary
Topic 1: TA Overview

TA Fiscal Year Benefits

Soldiers must request TA through GoArmyEd. **Soldiers may not bypass GoArmyEd and directly enroll with schools if they plan to use TA.**

The Department of Defense (DoD) has directed a uniform TA fiscal policy across the military services. Soldiers are subject to an established DoD cap and ceiling each fiscal year. The Army will pay 100 percent of the tuition charged by a school up to the established semester-hour cap and annual ceiling. Tuition Assistance will not cover the cost of any fees.

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<tr>
<th>TA Fiscal-year Benefits</th>
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<td>Soldiers are subject to an established DoD Cap and Ceiling (1 October-30 September)</td>
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Topic 1: TA Overview

Actions for Soldiers using TA Benefits through GoArmyEd

Soldiers need to complete the following steps before using TA:

Select “Request TA Access” button to complete VIA before using TA through GoArmyEd

- After the steps are completed, a case is created and escalated to the Soldier’s education center
- The Army Education Counselor will take approximately two business days to grant permission to use TA
- Soldiers receive an email if the request is approved or if further action is required
Topic 1: TA Overview

VIA

The TA program provides financial assistance for voluntary off-duty education programs in support of a Soldier's professional and personal self-development goals.

TA is available for courses that are part of an approved academic degree or certificate program. All Soldiers eligible for TA use will need to use VIA to select a career goal, degree plan, and home school before using TA benefits for the first time.
Topic 1: TA Overview

VIA

VIA will guide you through a complete decision-making process to help you select a long-term civilian career goal, degree plan, and school.

You do not have to complete VIA in one sitting. You may exit VIA at any point and your progress will be automatically saved.
Step 1: About You

VIA already knows a lot about you from your Military Personnel Record. By providing additional information about your interests, values, and preferences, VIA can further tailor recommendations for you.

All of the questions in this section are required in order for VIA to collect necessary information, but they are quick and easy to answer.
Step 2: Select a Career Goal

This section will show you all of VIA's civilian career recommendations that are aligned with your interests, values, and prior experience.

On the right side, you’ll see a “Relevance” heading. This overall score is made up of four factors:

- Interests
- MOS Alignment
- Salary Preference
- Values
Step 2: Select a Career Goal (cont)

a) VIA recommendations are automatically sorted by level of relevance to you, but you can also sort recommendations by job growth or salary potential by selecting the column header.

b) You can compare up to three different career fields at a time. Reviewing the options side-by-side allows you to compare careers in more depth.

c) If you are interested in a particular career, you can learn more about it on the Career Details page by selecting the hyperlinked career name. This information is provided and updated by the Department of Labor.
Step 2: Select a Career Goal (cont)

If you do not see a suitable career goal in VIA’s list of recommendations, you can always use the search function to find other careers.

After finding a career goal that fits you, select the “Make My Selection” button.

Remember, there are no wrong answers when choosing your Career Goal. Choose a career you could see yourself pursuing after leaving the Army someday that leverages your background, skills, interests and future income goals.
Step 3: Select a Degree Program

VIA will recommend a set of degrees or certifications that are aligned with your specific career goal either within or outside of the Army.

VIA has taken into consideration your current career goals, your current education level, and where and how you wish to take courses to help navigate you towards degrees that will make you more marketable in the civilian workforce.
Topic 1: TA Overview

VIA

Step 3: Select a Degree Program (cont)

On the degree recommendation page, several options are displayed that align with your career goal.

VIA will only show you the degree levels you are eligible to take using Tuition Assistance Benefits.

Select the “Search for other Degree Programs not listed” button to search by keyword(s) and/or other search criteria in order to filter results more accurately.

Contact your Army Education Counselor if you do not see a degree you believe you are eligible for.
Topic 1: TA Overview

VIA

Step 3: Select a Degree Program (cont)

a) You will see helpful icons under the Degree Offered column that indicate whether the degree is available to be completed in a classroom near you, in an online format, or both.

b) Similar to your career goal selection, you will also be able to compare up to three degrees at a time.

c) If you find a degree compatible with your career goal and preferences, select the recommendation and continue to the next step.

Note: When selecting your degree, an important factor to consider is the time it takes to obtain the degree relative to the time you have remaining in the Army. For example, if your separation date is in 2 years, you may consider obtaining a 2-year certificate that will increase your salary potential upon separation, rather than pursuing a bachelor’s degree that may take much longer to complete.
Topic 1: TA Overview

VIA

Step 4: Select a School

VIA will provide a list of recommended schools that offer the degree you just selected or one very similar to it. The recommendations are sorted based on their relevance to you and the selections you’ve made in previous steps. Schools higher on the recommendation list are VIA’s “Best Fit/Best Value” recommendations for you.

VIA bases its relevance score on a combination of five factors:

- **Admissions Profile**: How likely are you to meet the school’s admission standards?
- **Preferences**: How well does the school align with the preferences you indicated in the About You section?
- **Soldier Outcomes**: How have other Soldiers performed who previously used TA at this school?
- **School Outcomes**: How has the general population attending this school performed?
- **Cost**: What is the average semester hour cost for classes at this school compared to other schools?
Topic 1: TA Overview

VIA

Step 4: Select a School (cont)

On the comparison page, key factors to pay attention to include:

- **Degree Offered**

Does the school offer the degree you selected? If a school you wish to attend does not offer your selected degree program online or near your current location entered under the Preferences section, you will need to select a different school or degree.

- **Accreditation**

Is the school regionally or nationally accredited? Just as regionally accredited schools have degrees that are valued in the workplace, so too do nationally accredited schools have degrees that are valued—especially in some specialized areas. But regionally accredited schools generally prefer accepting credits from other regionally accredited schools so make sure you understand the differences.

- **Tuition Cost**

How much does the school charge per semester hour? Even if Tuition Assistance covers the full cost, you won’t be able to take as many classes per semester if you attend a higher cost school, and you will have a higher recoupment cost if you fail a class that costs more.
Topic 1: TA Overview

VIA

Step 4: Select a School (cont)

Class Format

What course delivery formats are offered at this school for my degree? A school that offers courses in both classroom and online formats gives you the most flexibility.

Admissions Requirement

What are the admissions requirements for this school? An open admissions school will accept all students and may have a simple application process. A competitive school may have some minimum acceptance criteria to be admitted and not accept everyone that applies.

Retention Rate

What is the retention rate at this school? A higher retention rate means that students attending this school keep making progress toward their degree more often than schools with lower retention rates.
Step 4: Select a School (cont)

After you have made your selection, the school you selected may have indicated to VIA that they offer several versions of the degree you want to pursue.

If this is the case, you will be prompted to clarify the specific degree you wish to pursue at that school.

If the school has not provided their degree information to VIA, you will be asked to verify the name of the specific degree with the school and manually enter the degree name.

Select the “Search for other Schools not listed” button to search by keyword(s) and/or other search criteria in order to filter results more accurately.
Topic 1: TA Overview

VIA

Step 5: Review and Submit

Review your selections one last time.

If you wish to make any adjustments, you can go back and update any section in VIA.

For those eligible for TA, you will submit your selections for Army Education Counselor review and approval.

You can track the status of your approval request from your GoArmyEd homepage or Student Record. You will receive an email confirming that your selections have been approved.
Step 5: Review and Submit (cont)

After you are approved, you are ready to start requesting TA for your classes. When you request TA for your first class, you will be prompted to complete a Common Application for your school and sign an electronic TA Statement of Understanding as a last required step.
Topic 1: TA Overview

Viewing Your Account

GoArmyEd enables you to view the status of your TA account.

Select the “Other Links” Smart Link on your homepage and then select the plus sign next to “Before You Enroll in a Class” to:

- View how much TA you have used each fiscal year, how much remains in the current fiscal year, and your residency status at your home school by selecting the “View Financial Status” link
- View a detailed breakdown by fiscal year of all TA-funded classes by selecting the “View TA Details” link
Topic 1: TA Overview

Tools to Assist You

If you take a class that does not advance you toward your approved degree, or if you fail to successfully complete your class, you may be required to repay the Army the TA dollars.

Your Student Agreement or Documented Degree Plan, Degree Progress Report (class requirements you have and have not met), Course Planner and Auto Advisor (recommendations for classes that are required by your degree plan) are important tools for guiding your class selection.

Create a GoArmyEd Helpdesk case or contact your Army Education Counselor or school advisor directly to assist you before enrolling in a class if you are unsure of which class to take and

1. You do not yet have a Student Agreement or a Documented Degree Plan; or
2. The Degree Progress Report is not available for your degree plan.
Topic 1: TA Overview

Should You Enroll in a Class?

Before enrolling in a class, be sure to consider the following factors:

- Work duties—Have you verified them with your Commander?
- Time commitments—Should you enroll in an eight-week or 16-week class?
- Out-of-pocket expenses—Will your class require significant fees not covered by TA?
- Available TA—Have you considered the number of classes you anticipate taking during the fiscal year?
Topic 2: TA Request Requirements

Summary

Below is a summary of the key actions you should take when enrolling in a class offered through GoArmyEd.

Annual Requirements

✓ Complete your quarterly TA Statement of Understanding (SOU). You will be prompted by GoArmyEd to acknowledge your electronic TA SOU.

✓ Ensure you have a SOCAD Student Agreement (SA) or Documented Degree Plan in your GoArmyEd Student Record prior to the end of the sixth SH taken at your home school, or before completing nine SH at multiple schools using TA, whichever comes first.
Topic 2: TA Request Requirements

Summary (continued)

Below is a summary of the key actions you should take when enrolling in a class offered through GoArmyEd. You must not bypass GoArmyEd if you plan to use TA. View the Class Enrollment Guide for detailed Step-by-step Instructions.

Requirements for Every Class Enrollment

- Assess your availability to take a class or classes.
- Identify classes that will advance you toward your approved degree. Use your Student Agreement or Documented Degree Plan, Degree Progress Report, Course Planner, and Auto Advisor.
- Read the Class Details in the Class Schedule prior to enrolling in a class.
- Read GoArmyEd messages and instructions that appear during the enrollment process.
- Resolve any holds or recoupments on your account.
  - Take the training modules titled Holds and Recoupments.
  - Check your preferred email account for email communications.
Topic 3: Class Enrollment Guide for Requesting TA

Step-by-step Instructions and Training Videos

You can access the Step-by-step Instructions for requesting TA and enrolling in a class two ways.

• From your homepage, select “View Reference Documents” in the Training Resources section.

Or

• Review topics in the GoArmyEd Assistance Center. Select the green question mark icon to visit the GoArmyEd Assistance Center.
Topic 4: Register for a Class Directly in GoArmyEd

How to Enroll

It is highly recommended that you print and follow the Class Enrollment Guide the first few times that you request TA and enroll in a class using GoArmyEd. The Class Enrollment Guide provides simple-to-follow screen shots of each step in the enrollment process.

To enroll in a class, select the “Request TA” Smart Link from your homepage.
Topic 4: Register for a Class Directly in GoArmyEd

Course Planner

If you are in Drop-down, Other or External degree plan and have completed six semester-hours (SH) at your home school or nine SH at any school (which ever comes first), you are required to submit a Course Planner.

Soldiers are required to upload a student agreement or documented degree plan in the Course Planner. To complete Course Planner Soldiers should use their student agreement or documented degree plan to input the total number of units still required to complete their degree and then input the remaining courses to fulfill these units.

To begin using Course Planner, select the “Course Planner” Smart Link from your homepage.
Topic 4: Register for a Class Directly in GoArmyEd

Course Planner (cont)

Use the Course Planner to track your academic progress in GoArmyEd. You must complete the Course Planner once you have met the six SH or nine SH requirement.

To set up your Course Planner:

• Upload your Student Agreement/Documented Degree Plan
• Enter your Units Remaining to Graduate
• Search and add courses that will advance you towards your chosen degree

Your Course Planner will be submitted to your Army Education Counselor or School reviewer for approval.

View the reference document titled, “Using Course Planner” for Step-by-step Instructions on using the Course Planner tool in GoArmyEd.
Topic 4: Register for a Class Directly in GoArmyEd

Course Planner

Multiple users will not be able to view the same Course Planner simultaneously. If a user attempts to view a Course Planner that is currently being viewed or edited by another user they will receive a Course Planner Wait Message. This message will appear for:

- Soldiers
- Army Education Counselors
- School users flagged as Course Planner reviewers

**Note:** You will have read-only access until the Course Planner has been submitted by the prior user.
Topic 4: Register for a Class Directly in GoArmyEd

Course Planner

Soldiers must select the “Submit” button in order to submit their Course Planner for review. There are two “Submit” buttons on the Course Planner, but a Soldier only needs to select the button once.

**Note:** This message will populate for Soldiers who are creating their Course Planner after you select the “Unit Type” from the drop-down. If the Soldier makes updates to the Course Planner the message will also populate after a new course is added.
A message has been added to the Non-LOI Course Search page for schools with a large course catalog. This message will advise you that the course catalog results will take time to load.

For a faster response you can enter in additional course search information in the Search Criteria section such as:

- Subject
- Catalog
- Description

Select the “Search” button to retrieve the narrowed search results.
Army Education Counselors, School users and Soldiers can select the “Action History” link within Course Planner. The Action History pop-up message displays the following information:

- Date an action was taken
- Action taken
- Last name of user
- First name of user
- User’s role
Topic 4: Register for a Class Directly in GoArmyEd

Course Planner

Students, Army Education Counselors and School users flagged as Course Planner reviewers are able to view the Student Course Planner submit date in the “Student Submit Date” column in Course Planner.

Note: The date in the Student Submit Date column will be the most recent Course Planner submission. For example, if your course in Course Planner was rejected and you resubmit your Course Planner for review the resubmission date will appear in the “Student Submit Date” column.
Topic 4: Register for a Class Directly in GoArmyEd

Course Planner
When your Course Planner is approved, you are ready to enroll in your class or generate a Request TA form through GoArmyEd. You will be automatically routed to one of three enrollment paths using Course Planner.

PATH 1
If the Course Planner/Search Results screen appears.
Select the “Enroll” button next to the desired course to enroll in the class.

PATH 2
If the Non-LOI Class Search screen appears.
A message may appear advising Soldiers that due to a large course catalog results will take time to load. Select the “Search” button to view available Class sections for the course.
If a desired course listed select the “Course Not Found” button.
The Course Planner screen appears, follow the steps in Path 3 to the right of this page.

PATH 3
If the Request TA screen appears, read the instructions carefully for each section. The Student and School information sections are pre-populated with your information.
Scroll to the Class Information section, the “Subject” and “Catalog Nbr” fields are pre-populated with the subject and catalog number entered in Course Planner.
Enter the start and end date into the “Start Date” and “End Date” fields.

View the reference document titled, “How to Enroll into Classes Using the Course Planner” for Step-by-step Instructions on using the Course Planner tool in GoArmyEd.
Topic 4: Register for a Class Directly in GoArmyEd

Paying for the Class

During the class enrollment process, if the “YOU MUST PAY” field on the Confirm Classes screen indicates you are responsible for all or a portion of the class cost, you must self-pay that amount directly to the school. A brief description of the reason for payment appears.

Your Financial Status and TA Details pages are updated automatically to deduct the TA applied to the cost of your class from your annual benefit.

Confirm Classes page

WARNING: YOU MUST PAY!

Army policy does not allow use of Tuition Assistance (TA) if your TA grade point average (GPA) is below a 2.0 after you have completed 15 or more semester hours using TA.

Our records indicate that your TA GPA is below 2.0. If you enroll in this class you must pay the full class cost.

Select “Cancel Request” if you do not agree to pay and contact an Army Education Counselor.

You MUST choose “Cancel Request” if you do not agree to pay the amount in red above. TA will not pay this amount. No exceptions will be granted. If you think that there is an error, contact your Education Counselor. You may need a course override.
Topic 4: Register for a Class Directly in GoArmyEd

Paying for the Class

During the class enrollment process, if you are responsible to pay any or all of the class cost a message appears on the Class Cost section of the Request TA page after the you select the “Calculate Cost” button advising you what you must self-pay directly to the school and why.

The message includes the following reasons for self pay:

- Over 16SH
- GPA Hold
- Self-Pay Option
- Not Enough remaining TA
- Duplicate Class
- or Class Already Started
Topic 4: Register for a Class Directly in GoArmyEd

Semester hour limit

Soldiers enrolling in to a class that exceeds the 16 semester hour fiscal year limit will receive a pop-up message advising that you are partially over the maximum fiscal year semester hour limit. The class cost will be split between TA and student funded costs.

**IMPORTANT:** Partial pay TA Requests will **NOT** be auto-approved unless your school has approved Tuition rates.

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Message

With this class, you will exceed the fiscal year maximum semester hour limit.

Per Army policy, you will be required to pay any class tuition costs associated with semester hours that are over the maximum fiscal year semester hour limit.

OK
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If you select the “Submit” button on the TA Request form and there are $0 in the “Unit Cost” field, the TA Request will be automatically approved as there are no costs to the Army. A pop-up message will appear advising you that if you continue with this process you will be responsible for the entire cost of the class.

If this is NOT what you intended:
1. Select the “Cancel” button
2. Update the “Unit Cost” field
3. Select the “Calculate Cost” button
4. Select the “Submit” button to have your request reviewed by an Army counselor for approval

This pop-up message will NOT display if:
- Final Army Cost is $0 due to a hold that requires the Soldier to Self Pay
- The “I choose not to use TA and to Self Pay ALL costs for this class” field is checked
During the class enrollment process, a Soldier can choose to pay 100% of the cost of a class despite the availability of TA funds.

- Soldiers who have exceeded the semester hour limit for their degree and are on either an Undergraduate or Graduate Semester Hour Hold can continue with an enrollment if they agree to pay 100% of the class cost.
- Soldiers can self-fund up to nine times a term (quarter).
- The self-pay option is only available to Soldiers when the TA Request is in the Pending state.
- Non-LOI enrollments that are self-funded will not require ESO-CE approval.
- If the Soldier is on additional, more restrictive holds, self-pay is not available.
- Tuition Assistance will not cover the cost of any fees.
Topic 4: Register for a Class Directly in GoArmyEd

Auto Advisor

View instructions for using Auto Advisor, a streamlined process for enrolling in classes aligned with your approved degree plan. The feature is not available to Soldiers enrolled in an External Degree Plan, Other Degree Plan, or a degree labeled with a “–d” in the Schools and Programs section of GoArmyEd. Auto Advisor uses data from degrees that are fully set-up in GoArmyEd to make its recommendations.

- For additional assistance with Auto Advisor select the green question mark icon to go to the GoArmyEd Assistance Center.
- From the GoArmyEd homepage, select “View Reference Documents” in the Training Resources section.
- Select Step-by-step Instructions titled: “Using Auto Advisor.”
Topic 5: School Admissions and Rejections

School Accepts/Denies Request

Your school automatically receives your enrollment request within one business day of your submission. Your school either accepts or denies the request.

- If you are admitted to the class, you should receive an email from your school confirming your class enrollment. You also may receive communications about the tuition balance due (if TA does not cover the full cost of the class).
- All active class enrollments will be listed on your GoArmyEd homepage.
- If the school rejects the class registration request, an automated email is sent to your preferred email account to inform you that your request has been rejected and explain why. The funds that were deducted from your annual TA benefit when you processed the registration request will be restored to your account.
- Schools are asked to process class enrollment rejections within three business days of receiving a class registration request.
Topic 6: Process a Request TA Form in GoArmyEd

Requesting TA

The Request TA Form

If your degree plan listed on your Student Record is listed as an External Degree Plan you **must** process a Request TA form through GoArmyEd to request TA for the school.

A Request TA Form must be approved before the start date of the class. If your Degree Plan is listed as External you should request TA at least 10 days prior to class start date to allow sufficient time for education personnel to approve the request.

**Important:** TA Requests submitted less than 10 days prior to course start date may not get approved by the class state date.

View the reference document titled, “How to Enroll into Classes Using the Course Planner” for Step-by-step Instructions on using the Course Planner tool in GoArmyEd.
If your Request TA form is approved, you are ready to enroll in your class directly with your selected school.

- You must provide the Army Tuition Assistance Authorization to your school by mailing, faxing, or hand delivering it to the appropriate office at your school.

View the section in the Class Enrollment Guide titled, "How to Print an Army Tuition Assistance Authorization Form" to print the form.
Topic 6: Process a Request TA Form in GoArmyEd

Status of TA Request

View the status for a specific Request TA form and class located within the TA Request Status column on your homepage in the My Education section.

If the status of your Request TA form is:

- **Pending:** Your request is in the Request TA queue awaiting the Army's review and decision.
- **Approved:** Provide the approved form to your school and enroll in your class directly with your school.
- **Rejected:** Resolve the issue stated in the email. You have a limited time to resubmit the same Request TA form.
- **Dropped:** The Request TA form was processed as a drop or withdrawal.
If your TA Request is rejected, you will receive an email stating the reason. If you resolve the issue within seven days after the class start date, you can resubmit the same Request TA form. If you have any questions, please contact your Army Education Counselor.

For additional assistance on Soldier topics select the green question mark icon to go to the GoArmyEd Assistance Center.

Follow the steps in the Quick Reference Guide titled, “Resolve Rejected Tuition Assistance (TA) Form,” or view the Instructional Video titled: Resolving a Rejected TA Request Form for assistance.

- A Request TA form must be submitted prior to the class start date or seven days after the official start date, whichever comes first
- You must provide the Army Tuition Assistance Authorization to the appropriate office at your school
Excess Class Costs

As of 4 September 2015, Veterans Affairs (VA) issued new guidance eliminating the use of the GoArmyEd Top-Up form in order for Service Members to make a claim against their Chapter 30 MGIB Benefits.

School Certifying Officials will now submit VA Form 22-1999 via mail or electronic version directly to the VA. For questions, visit the VA website at http://www.benefits.va.gov/gibill/ or contact an Army Education Counselor for additional information on GI Bill benefits.
Topic 9: Summary

Requesting Tuition Assistance (TA)
You have completed the Requesting Tuition Assistance (TA) module. In this module, you have learned about the following:

- Location for reviewing a complete listing of classes you have taken to date using TA and related financial information
- Class enrollment process
- Where to find resources in GoArmyEd to assist with class selections
- Use of the GoArmyEd Class Schedule to identify classes that advance you toward your degree
- Completion of class enrollments through GoArmyEd
- Process for registration requests when received by a school (either acceptance or denial by the school)