

Soldier Quick Start Training GoArmyEd

Module 3 Requesting Tuition Assistance (TA)



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 (Step-by-S
- Topic 4: Register for a Class Directly in GoArmyEd
- Topic 5: School Admissions and Rejections
- Topic 6: Process a TA Request Form in GoArmyEd
- Topic 7: TA Request Rejection
- Topic 8: Costs Exceed TA Amount
- Topic 9: Summary





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. <u>Soldiers are subject to an established DoD cap and ceiling each fiscal year.</u> The Army will pay 100 percent of the tuition and authorized fees charged by a school up to the established semester-hour cap and annual ceiling.

TA Fiscal-year Benefits

Soldiers are subject to an established DoD Cap and Ceiling (1 October-30 September)



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 the TA Request Wizard 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





TA Account Request Wizard

You may request to have TA permissions granted to your GoArmyEd account. TA permissions enable you to request TA benefits through GoArmyEd.

The TA Account Request Wizard includes six steps. Each completed step will be marked with a green checkmark. When you complete these steps and submit the request for approval, it will take approximately two (2) business days for an Army Education Counselor to grant you permission to request TA benefits through GoArmyEd. You will be notified by email if your request is approved or if further action is needed prior to approval being granted.

Below are TA Request Wizard steps:

- Step 1: TA benefits verification
- Step 2: View and acknowledge training
- Step 3: Submit the Tuition Assistance (TA) Statement of Understanding (SOU)
- Step 4: Decide on a home school and educational goal/degree plan
- Step 5: Initiate and submit a Common Application
- Step 6: Submit the request for approval



TA Account Request Wizard (continued)

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Step 1: TA Benefits Verification

Review information relating to TA benefits and access links to TA policies. If you receive a message stating you may be eligible for TA benefits, you can continue to the next step in the TA Account Request Wizard.

Note: In some instances you may receive a message stating you are not able to request TA and may need to check your personnel record. You may create a helpdesk case for further assistance.

Request TA Benefits			
ep 1: TA Benefits	Step 1: TA Benefits Verification		
rification Step 2: Training	To request access to Army Tuition Assistance, complete the following steps.		
Step 3: Statement of derstanding Step 4: Home School and	This Wizard has six steps and takes approximately 30 minutes to complete. You can save your work from within the Wizard and resume work at a future time by selecting the Request TA Access Link from your GoArmyEd homepage.		
gree Plan Step 5: Common Application Step 6: Submit Request	Once you've completed your request and submitted it for approval, it takes approximately two (2) business days for a Counselor to grant you permissions. You will be notified by email if your request is approved or if further action by you is needed prior to approval being granted.		
	For additional information about who is eligible for TA and TA Policies or to start your TA Account Request Wizard, please select from the following links: • <u>TA Eligibility Overview</u> • <u>TA Rates and Fees</u>		
	 Your record was found in the Army's Personnel Record Database. Records indicate your highest degree earned to date is High School Diploma. Congratulations! You may be eligible for TA benefits. 		
	Return to Homepage Save and Continue		

Select the **"Save and Continue"** button as you work thru the steps. If you decide to return to homepage without saving, the information will not be saved.



TA Account Request Wizard (continued)

Step 2: Training

Prior to using Tuition Assistance benefits, You must complete the training video or read the presentation to understand your roles, responsibilities and requirements for using this benefit. You must select the radio button to certify you have completed the GoArmyEd training before proceeding to Step 3.__



Select the **"Save and Continue"** button as you work thru the steps. If you decide to return to homepage without saving, the information will not be saved.



TA Account Request Wizard (continued)

Step 3: Statement of Understanding (SOU)

You may download a blank Annual TA SOU form and then upload the signed document to your eFile from step 3 of the Wizard . Soldiers with a rank of E-7 and above can sign for themselves and their commander.

If an SOU file already exists in eFile, it will be shown in the **Choose Existing Annual TA SOU** section to allow you to select it.

Request TA Benefits	
Step 1: TA Benefits	Step 3: Statement of Understanding
Verification Step 2: Training Step 3: Statement of Understanding Step 4: Home School and Degree Plan Step 5: Common Application Step 6: Submit Request	The Annual Tuition Assistance Statement of Understanding (Annual TA SOU) serves to apprise your Commander of the requirements of Army Tuition Assistance as stipulated in AR 621-5 and the conditions that support successful completion of your educational goals. It also serves to confirm your own understanding of TA policies and duty requirements which may prohibit class attendance. Soldiers are required to upload a signed Annual TA SOU to their eFile in GoArmyEd each year to continue using TA Benefits. Download Annual TA SOU: Download an Annual TA SOU using the link below.
	Annual TA SOU Form
	AND
	- Unload Signed Annual TA SOU
	opioau signeu Annual TA 500.
	After your Annual TA SOU is signed, upload it below.
	Transaction Type: Tuition Assistance Statement of Understanding
	Select a file to upload:
	Browse
	Note: File size is limited to 4096KB. Please zip the file if it exceeds 4096KB. Upload time will vary depending on the connection speed.
	OR
	Choose Existing Annual TA SOU:
	Could get find any existing Annual TA Statement of Understanding (TA SOLI)
	Could not lind any existing Annual TA Statement of Onderstanding (TA SOO)
	Return to Homepage Save and Continue

Select the **"Save and Continue"** button as you work thru the steps. If you decide to return to homepage without saving, the information will not be saved.



TA Account Request Wizard (continued)

Step 4: Home School and Degree Plan

You must select the "Link to Search" link in the "Home School" field to select your home school. When the school is located on the School Search screen, select the "Add" button for the school to populate in the "Home School" field.

Suspended or Inactive schools are ineligible to receive TA.

If the school is not found, it may not be set-up yet in GoArmyEd and you should create a helpdesk case.

The **"Degree Type," "Degree Plan"** and if applicable **"Degree Level"** fields must be selected.

Note: If the degree plan is **Other** or **External**, a free form field will appear and you must input the degree plan name.

You will be prompted to select the appropriate radio button when the question appears asking if you are already enrolled in a program before moving to the next step.





TA Account Request Wizard (continued)

Step 5: Common Application

You must complete the Common Application, which is used to process school admissions and class enrollments. Information should be saved before continuing to the next tab of the Common Application.

Additional Information Tab:

- The Common Application Status section alerts Soldiers when information is incomplete.
- You must select the checkmark certifying the information is true and complete at the bottom of the Additional Information tab prior to completing the Common Application .



Soldiers should select the **"Save and Continue"** button as they work thru the steps. If user decides to return to homepage without saving, the information will not be saved.



TA Account Request Wizard (continued)

Step 6: Submit Request

You should verify the accuracy of any information in previous steps before selecting the **"Submit For Approval"** button.

A case is created and the request will be routed to an Army Education Counselor for review.

You will be informed of the TA request approval decision within two business days of receipt. Use the case number to track your request while it is being reviewed.

If approved, you can request TA and enroll in classes.

Request TA Benefits	
Step 1: TA Benefits Verification	Step 6: Submit Request
Step 2: Training Step 3: Statement of	Please verify and make any corrections if needed by clicking on the wizard steps. If you are satisfied with your application, please submit for final review and approval. Your request will be routed to an ACES Counselor.
Step 4: Home School and Degree Plan V Step 5: Common Application V	Account approval decisions are made within two business days of receipt. You can track the status of your request from the "View Helpdesk Cases" link on your homepage.
Step 6: Submit Request	Submit For Approval Return to Homepage
/	
Request TA Benefi	
Step 1: TA Benefits	Step 6: Submit Request
Step 2: Training Step 3: Statement of	You have successfully completed the TA Account Request Wizard. Your request has been submitted to an Army Education Counselor for review and approval.
nderstanding Step 4: Home School and egree Plan	A case has been created on your behalf The case number is 1746497. You can track the status of your request from the "View Helpdes Cases" link on your homepage.
Step 5: Common Application tep 6: Submit Request	You will receive an automated email when your account request has been approved or denied. If your account request is denied, your email will include a reason and instructions for resolving any issues with your request.
	If your account is approved, you will be able to log into GoArmyEd with your username and password and may be able to start using TA benefits. However, if there are issues with your Army personnel record your GoArmyEd account will be placed on hold and you will receiv specific instructions about how to address the hold. Holds prevent Soldiers from using TA benefits until they are resolved.
	Submit For Approval Return to Homepage



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

Other Links This page displays all of the key links available to you within GoArm Click the plus icon Oto expand a group of links. Click on a link to go to that page. Return Home Other Links Link Name 🚖 After You Enroll in a Class Before You Enroll in a Class Complete/Update Common Application The "Comple you that you is your respo button at the b View Application Status The "View App missing docume Documented Deg View Hold History The "View Holds tuition assistance the issue that pro Select the "Viev Resolving Holds View Financial Status. The "View Fin in-state tuition View Student Agreement/Degree Progress Report The "View S select degre Access PReP The "Acces Soldier's ter /iew TA Detai The "View The "View ew Class Evaluations by Soldiers distribution o core Reques The "Transcr that they



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 SOCAD Student Agreement or Documented Degree Plan, Degree Progress Report (class requirements you have and have not met), 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 SOCAD Student Agreement or a Documented Degree Plan; or
- 2. The Degree Progress Report is not available for your degree plan.

After You Enroll in a Class Before You Enroll in a Class Complete/Update Common Application	The "Complete/Updat
After You Enroll in a Class Before You Enroll in a Class Complete/Update Common Application	The "Complete/Updat
Before You Enroll in a Class Complete/Update Common Application	The "Complete/Updat
Complete/Update Common Application	The "Complete/Updat you that your school
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View Application Status	The "View Applicat missing documents Documented Deg
View Hold History	The "View Holds tuition assistand the issue that p Select the "Vie
	Resolving Hok
View Financial Status	The "View Fin in-state tuition
View Student Agreement/Degree Progress Report	The "View Stu select degree p
Access PReP	The "Access PA Soldier's technic
	The "View TA De



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?

Army National Guard Soldiers can begin requesting TA through GoArmyEd on 1 August 2011 for all TA-funded classes that start on or after 1 October 2011



Summary

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

Annual Requirements

- Complete your TA Annual Statement of Understanding (SOU). You will be prompted by messages in GoArmyEd and through emails to print out a TA SOU from GoArmyEd each year and return it to an Army Education Center by your annual deadline.
- Ensure you have a SOCAD Student Agreement (SA) or Documented Degree Plan in your GoArmyEd Student Record prior to the end of the sixth semester hour taken at your home school, or before completing nine semester hours at multiple schools using TA, whichever comes first.



Summary (continued)

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

Requirements for Every Class Enrollment

- \checkmark Assess your availability to take a class or classes.
- Identify classes that will advance you toward your approved degree. Use your SOCAD Student Agreement or Documented Degree Plan, Degree Progress Report, 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.
- \checkmark Resolve any holds or recoupments on your account.
 - Take the training modules titled Holds and Recoupments.
 - Check your preferred email account for email communications.



Summary (continued)

There are two methods of enrolling in a class depending on the school you attend. You must not bypass GoArmyEd if you plan to use TA. View the **Class Enrollment Guide** for detailed step-by-step instructions on any process listed below.

Register for a class directly in GoArmyEd

 Some schools upload classes and tuition costs to an online class schedule in GoArmyEd, enabling Soldiers to search and register for the class through GoArmyEd without requiring Army Education Counselor's review and approval, and without requiring registration for the class at the school.



Summary (continued)

Process a TA Request Form in GoArmyEd

- Some schools do not upload classes and tuition costs to GoArmyEd. Soldiers must enter the class and tuition cost information on a TA Request form in GoArmyEd and receive Army Education Counselor approval for the request.
- **Important:** Soldiers are required to provide proof of the tuition cost prior to approval of the TA Request form. The information clearly must be from the school as it applies specifically to each class (e.g., a memo on school letterhead, an invoice/itemized receipt from the school, or documentation from your online account with the school). Soldiers are responsible for uploading the information to the eFile in their Student Records.
- After providing the school the approved Army Tuition Assistance Authorization form, Soldiers then register for the class directly with the school.



Topic 3: Class Enrollment Guide for Requesting TA

Step-by-step Instructions

You can access the step-by-step instructions for requesting TA and enrolling in a class three ways.

 From your homepage, select the "Class Enrollment Guide (PDF Version)" Smart Link.

Or

 From your homepage, select "View Reference Documents" in the Helpdesk Resources section.



• Select the yellow **Helpdesk** tab located at the top right.



GO/ArmyEd.		A state
Welcome back, SSG Ed Online.		Helpdesk
Smart Links		
Request TA	/ithdraw from a Class	On-Duty Courses
My Education Record	Auto Advisor	Library Resources
My Smart Links [Edit]	lit" link to percendize your Smart	t Links
My Education Center	Army Personnel Testing	Class Enrollment Guide (PDF Version)
Help Desk Resources		
help beak Resources		
View GoArmvEd Introductory	Slides	
Launch Quick Start Training		
View Reference Documents		
- Create a Haladaak Casa		
Create a Helpdesk Case Track Usia dask Oraci(s)		
Irack Heipdesk Case(s)		



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.

GoArmyEd 。		1-1-2-		U.S.ARMY
Welcome back, SSG Ed Online		Helpdesk Logou	ıt	Search
Smart Links				
Request TA	Withdraw from a Class	On-Duty Courses	Recoupment-Information	
My Education Record	Auto Advisor	Training	Other Links	
Muc	Surround Tection			

GoArmyEd Portal

Module 3: Requesting Tuition Assistance (TA)

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.

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.





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.

- From the GoArmyEd homepage, select "View Reference Documents" in the Helpdesk Resources section.
- Select the step-by-step instruction 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 TA Request Form in GoArmyEd

Requesting TA

The TA Request Form

If your school does not upload classes and tuition costs in the GoArmyEd Class Schedule, you **must** process a TA Request form through GoArmyEd to request TA for the school.

A TA Request form must be requested prior to the class start date or the school's last day of registration, whichever comes first.

View the section in the Class Enrollment Guide titled, *"Requesting TA for a Class Through GoArmyEd,"* pages 3-4 and 10-15, to complete a TA Request form.

Go/Army	Ed		Home Add to Envortes Close W
•			Tome Add to ravorites Close w
A Request			
pon entering the cours aceive notification of ap tatus. If you do not wisl	e information below, press the 'Subr proval or rejection of this request eith h to submit this request, close the wi	niť button to submit this d ner via email or by returnir ndow without clicking the	ata as an enrollment request. You will ig to this page and viewing the Course 'Submit' button below.
nce approved, the 'Prir nable to print the reque ave this form. Please t	nt TA Request Form' button will becor est form immediately after the PDF is be advised: if you are using a shared	ne active allowing you to o created, you may click the computer, save the PDF t	create a PDF request form. If you are a 'Save a Copy' button on the PDF to o a disk to ensure privacy.
OTE: o drop this enrollment.	update the Course Status to Droppe	ed' and click the 'Submit' b	utton.
o retrieve an existing re	equest, click the 'Return to Search' bu	itton at the bottom of the p	age. Please do NOT press the 'Back'
utton on your browser.			
o generate a new TA re	equest, click the 'Add' button at the bo	ttom of the page.	
Student Information	Student Information Se	ction: Your personal	information is pre-populated.
EmplID:	0001234	Soldier Status:	Active
Name:	Doe, John		
Rank:	SSG	SSN:	-0022
Phone:	270-123-2345	Email:	jdoe@efutureed.com
Current PA Type:	Traditional eCourse	Original PA Type:	Traditional eCourse
PA Migration Date:	08/23/2010		
Unit:			
Geo Ed Center:	Ft Knox Geo Ed Center		
Army Location:	Ft Knox		
Soldier Mailing Addr	ess		
123 Moon Drive RADCLIFF, KY 4016	1		
-			
School Information	School Information Sec	tion: The school's in	formation is pre-populated.
School:	ASC02 Adams State College		
Degree Name:	Associate of Arts in General Studie	es (AA-AGS) (AGS)	
Address:	208 Edgemont Boulevard Alamosa, CO 811022373		SDN: ATA1ADAMSSTCX
School Primary URL:	www.adams.edu	School Secondary UF	RL: www.adams.edu
POC Name:	Judy Phillips		
POC Phone:	7195877671		
DOC EMails	ilabilli@ofuturood.com		
POC Email.	Jiprinin@elutureed.com		



Topic 6: Process a TA Request Form in GoArmyEd

Requesting TA

If your TA Request form is approved, you are ready to enroll in your class directly with your selected school.

 You must provide the Army Tuition Assistance Authorization form 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.

Request By	Submit Date				
e information on this proval within the sam requests that have n proved (for TA reques	page provides a summary te day (Eastern Time) and tot yet been approved by a sts that were approved by a	/ of your TA reques the course status Counselor), Rejec a Counselor), or D	ts that have been submit for each request. A cours ted (for TA requests that) ropped (for approved TA r	ted for Army Education se status may either be were not approved by a requests that have beer	
ace a checkmark in th Request Report for y ore than one school o op or modify a TA Reo tailed TA Request Fo	ne box under the Print colui your own records or to prov or fiscal year, a separate re quest, select the "Details" t rm.	mn for TA Request ride to a school. P port will print for e- button for the TA Re	is that are in approved sta lease note that if you sel ach school and only list th equest you wish to chang	atus that you wish to pri ect Print for TA Request re courses offered by th re and make the change	
ident Information					
impliD:	0001234		Current Degree Plan		
lame:	Doe, John				
Rank:	SSG		SSN:	-0022	
Phone:	270-123-2345		Email:	jdoe@efutureed.com	
Current PA Type:	Traditional eCourse		Original PA Type:	Traditional eCourse	
PA Migration Date:	08/23/2010		Home School:	Vincennes University	
Jnit: Seo Ed Center:	Ft Knox Geo Ed Center				
Army Location:	Ft Knox		Submission Date:	04/13/2011	
Soldier Mailing Addr	055				
123 Moon Drive RADCLIFF, KY 4016	1				
Print TA Select Details	chool	Course Status	*Course Level	Subject Cata	
Details A	dams State College	Approved	Undergraduate Lower	Division ART 100	



Topic 7: TA Request Rejection

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 TA Request form. If you have any questions, please contact your Army Education Counselor.

Follow the steps in the Class Enrollment Guide titled, *"How to Resolve a TA Request Form Rejection,"* pages 21-24.

- A TA Request form must be submitted prior to the class start date or the school's last day of registration, whichever comes first.
- You must provide the Army Tuition Assistance Authorization form to the appropriate office at your school.





Topic 8: Top-Up Form

Excess Class Costs

If eligible, you may use a Top-Up Form to request reimbursement from Veterans Affairs (VA) for excess class costs.

To access the Top-Up Form from GoArmyEd, select the **"Other Links"** Smart Link. Next, select the plus sign icon next to **"Enroll or Drop/Withdraw from a Class"** link, then select **"Top-Up Form."** Follow the instructions on the Student Top-Up Form Generation screen.

Contact your Army Education Counselor for additional information on the VA Top-Up program and on other financial support that is available to you.





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)

