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-Step)
- 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
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 and authorized fees charged by a school up to the established semester-hour cap and annual ceiling.

<table>
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<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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*Note: Green underlined text designates new information or changes*
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 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
Topic 1: TA Overview

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
Topic 1: TA Overview

TA Account Request Wizard (continued)

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.

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.
Topic 1: TA Overview

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.
Topic 1: TA Overview

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.

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.
Topic 1: TA Overview

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.
Topic 1: TA Overview

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.
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 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.
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?

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.
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 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.
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.

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 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.
- Resolve any holds or recoupments on your account.
  - Take the training modules titled Holds and Recoupmets.
  - Check your preferred email account for email communications.
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.
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.

  Or

- Select the yellow Helpdesk tab located at the top right.
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

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.
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.
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.


- 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)