

AIR NATIONAL GUARD RETENTION PROGRAMS

This instruction implements AFPD 36-26 and prescribes the policies and procedures for establishing and conducting the Air National Guard (ANG) Retention Program which includes the Career Motivation Program (retention interviews), ANG Incentive Program, the Montgomery GI Bill, the Unit Career Advisor (UCA) Management, and other elements. Unit commanders have the overall responsibility for the retention in their units; however, the day-to-day operation of administering the programs contained within this instruction are the responsibility of the Retention Office Manager (ROM), and at Geographically Separated Units (GSUs), the GSU Recruiting/Retention NCO. (Throughout this instruction, whenever the word ROM appears, it should be assumed this refers to the GSU Recruiting/Retention NCO as well.) Unit commanders must not change any policy or procedure set by this instruction. Forward proposed changes to the instruction through channels to ANG/MPPAR, 3500 Fetchet Avenue, Andrews AFB, MD 20762-5157.

Privacy Act Statement. This instruction directs collecting and maintaining information protected by the Privacy Act of 1974 authorized by 10 U.S.C. 275 and 8013.

SUMMARY OF CHANGES

This is the first publication of ANGI 36-2607, which supersedes NGR (AF) 35-16, 29 Dec 89. This instruction reorganizes text and changes, and/or adds new requirements and procedures.

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11. Non Prior Service (NPS) Enlistment Cash Bonus Written Agreement, NGB Form 36-8.
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 13. Incentive Payment Authorization, NGB Form 38-4.
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 15. The Air Force Ready Reserve Stipend Program (AFRRSP) Certificate of Enrollment, AF Form 3046.
 16. MGIB Act of 1984, DD Form 2366.
 17. Selective Reserve Educational Assistance Program Notice of Basic Eligibility, DD Form 2384-1.
 18. DoD Educational Loan Repayment Program (LRP) Annual Application, DD Form 2475.
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Chapter 1

INTRODUCTION

1.1. Policy. The ANG Retention Program is designed to accomplish the following. References, Abbreviations, Acronyms and Terms are contained in attachment 1.

1.1.1. Motivators. Use retention interviews, incentives, the Montgomery GI Bill (MGIB), and other positive motivators to retain qualified and experienced personnel commensurate with unit manning requirements.

1.1.2. Family and Employer Support. Coordinate and initiate programs that will encourage positive support from unit family members, civilian employers, and the community.

1.1.3. UCA Program. Manage a Unit Career Advisor (UCA) program that will enable the unit commander, the Recruiting and Retention Superintendent (RRS), and the Retention Office Manager (ROM) to effectively administer retention programs, assist in force management, and to meet strength goals and personal goals of unit members.

1.1.4. Retraining. Encourage retraining of excess personnel into valid unit manning document (UMD) vacancies identified as critical.

1.1.5. Influencers. Provide methods for evaluating factors impacting retention.

1.1.6. Effectiveness. Measure the effectiveness of retention efforts.

1.2. Responsibilities:

1.2.1. Air National Guard /Retention Operations Section (ANG/MPPAR). ANG/MPPAR will:

1.2.1.1. Function as the office of primary responsibility (OPR) and waiver authority for executing the ANG Retention Program where permitted.

1.2.1.2. Gather metrics to analyze and monitor ANG, State, and unit retention effectiveness, use of incentives, MGIB involvement, budgetary needs, and supply such data to those in need when appropriate.

1.2.1.3. Monitor MGIB entitlement and provide metrics to Air National Guard /Financial Management (ANG/FM) for use in transfer of funds to the MGIB Trust Fund account.

1.2.1.4. Assist in providing retention advertising and publicity materials promoting ANG benefits and entitlements.

1.2.1.5. Manage the ANG Incentive and MGIB programs in the following areas:

1.2.1.5.1. Monitor personnel record updates for ANG Incentive and MGIB programs to ensure accuracy of data affecting the member's eligibility.

1.2.1.5.2. Establish procedures to resolve errors that may occur in administration of the ANG Incentive and MGIB programs.

1.2.1.5.3. Program funds to support the ANG Retention and Incentive Programs.

1.2.1.6. Conduct Staff Assistance Visits (SAVs) to the State headquarters' RRSs and to the ROMs at their locations when appropriate.

1.2.1.7. Assist in the planning and conducting of national and regional recruiting and retention conferences and workshops, and brief at other conferences and workshops when appropriate.

1.2.1.8. Maintain a working relationship with NG Family Programs (NGB-FP) and act as point of contact (POC) for retention's role in the Family Program.

1.2.1.9. Act as liaison between ANG units and the National Committee for Employer Support of the Guard and Reserve (NCESGR).

1.2.1.10. Serve as the focal point for:

1.2.1.10.1. Training retention personnel (Recruiting/Retention Superintendents (RRS), ROMs and UCAs), as well as others who have an interest and impact on retention (First Sergeants/Commanders), on ANG retention programs, policies, and procedures.

1.2.1.10.2. Administering the Professional Continuing Education (PCE) Retention Course conducted at McGhee Tyson ANGB, TN, and the UCA Outreach Course; evaluating the structure and content of the courses and updating as needed.

1.2.2. State Level:

1.2.2.1. The Executive Support Staff Officer (ESSO) has overall responsibility for the State recruiting and retention program.

1.2.2.2. The State Human Resource Force Management (HRFM) NCO.

1.2.2.2.1. The role of the State HRFM NCO is to advise command leadership on issues that require recommendations to enhance the organization's culture, promoting opportunities for all ANG members to maximize their potential for success without regard to their cultural differences.

1.2.2.2.2. The State HRFM NCO is responsible to work with key individuals in the human resource process to develop and recommend processes to meet diversity management objectives within the organization.

1.2.2.3. The State RRS:

1.2.2.3.1. The RRS is the focal point on the State staff for management of the ANG Retention Program. The RRS will:

1.2.2.3.2. Advise on the status and effectiveness of the State Retention Program and provide such reports as may be required by ANG/MPPAR.

1.2.2.3.3. Coordinate and oversee the development of State incentive AFSC lists and establish controls of funding authorizations to ensure the funding limits imposed by ANG/MPPAR are not exceeded, and that funding and programs are managed effectively throughout the State.

1.2.2.3.4. Evaluate retention and incentive data, reports, and studies for program effectiveness; identify and advise where corrective action may be needed.

1.2.2.3.5. Request audits of incentive and MGIB records by the State U.S. Property and Fiscal Office (USPFO) every 3 years and as ROMs transition out of the position, to ensure only eligible members are receiving incentive benefits and entitlements.

1.2.2.3.6. Act as State POC (for Air) for Family and Employer Support Programs, and ensure that ROMs receive current information.

1.2.2.3.7. Administer the ANG ROM and UCA of the Year Awards Program.

1.2.3. Base level:

1.2.3.1. The Wing Commander establishes and ensures effective management of the base level Retention Program.

1.2.3.2. The Wing HRFM NCO:

1.2.3.2.1. The role of the Wing HRFM NCO is to advise the Wing Commander on issues that require recommendations to enhance the organization's culture, promoting opportunities for all ANG members to maximize their potential for success without regard to their cultural differences.

1.2.3.2.2. The Wing HRFM NCO is also responsible to work with key individuals in the human resource process to develop and recommend processes to meet diversity management objectives within the organization.

1.2.3.3. The Director of Personnel (DP) supervises the Retention Office Manager. However, it is essential to program design that the RRS be involved in the oversight, evaluation, and administration of all retention programs, and the selection of, and career management, of the ROM. The DP:

1.2.3.3.1. Provides information to the RRS and ROM on personnel policy changes and any actions affecting retention.

1.2.3.3.2. Ensures timely distribution of retention management products, statistical data, and reports to serviced units, wing commanders, State headquarters and ANG/MPPAR.

1.2.3.3.3. Reviews reports of UCA SAVs conducted by the ROM and provides recommendations to the commanders and the RRS.

1.2.3.3.4. Submits nominations through the RRS for ANG ROM and UCA of the Year Award to State headquarters IAW guidelines outlined in ANGI 36-2802, ANG Special Trophies and Awards.

1.2.3.4. The Retention Office Manager (ROM) is the program manager for the base level Retention Program. (The GSU Recruiting/Retention NCO manages the retention program at the GSU. Hereafter, all references to "ROMs" include responsibilities of the GSU Recruiting/Retention NCO as well, unless indicated otherwise). The ROM will:

1.2.3.4.1. Monitor appointment of UCAs and provide them with advisory assistance in establishing the unit Career Motivation Program (CMP).

1.2.3.4.2. Provide documented UCA initial training and annual refresher training. The initial UCA training will be provided within 3 months following written appointment by the unit commander.

1.2.3.4.3. Counsel airmen on career issues when requested by the member or referred by the unit commander, first sergeant, UCA, supervisor, or recruiting personnel. In addition:

- 1.2.3.4.3.1. Conduct interviews of those members who have indicated they are undecided or have indicated that they will decline reenlistment.
- 1.2.3.4.3.2. Conduct interviews of those members who request separation prior to their ETS. Evaluate and make recommendations to the commander, with an information copy to the RRS.
- 1.2.3.4.3.3. Ensure exit interviews are conducted of members separating prior to or during out-processing, to identify reasons for separating and, when appropriate, help relocating members transfer to another ANG unit.
- 1.2.3.4.4. Ensure exit surveys are accomplished by separating members and findings are compiled in a report at least quarterly. Forward exit reports to unit commanders, wing commander, DP, RRS, State Senior Enlisted Advisor (SEA), and the HRFM. Information on the five top reasons that members separate according to exit reports will be reported on the ANG 599R, Retention Budget & Loss Report (attachment 2), and forwarded to MPPAR.
- 1.2.3.4.5. Conduct visits to each unit serviced by the MPF as necessary to ensure program effectiveness. A formal SAV will be conducted every 2 years for each unit and should be conducted during a unit training assembly (UTA). A report of the SAV will be forwarded, through the DP, to the respective unit commander within 30 days after the SAV. An information copy of the report will be forwarded to the next higher level of command and to the RRS.
- 1.2.3.4.6. Provide all levels of command, the RRS, and all serviced units with monthly retention metrics. Present a retention briefing or written report to the wing commander at least quarterly. Provide reports and related retention metrics to ANG/MPPAR as requested.
- 1.2.3.4.7. Promote ANG retention through base advertising and publicity efforts.
- 1.2.3.4.8. Submit a retention plan and budget request annually to the RRS for inclusion in the State recruiting, retention and advertising plan.
- 1.2.3.4.9. Participate in MPF in-house training to ensure MPF personnel are informed of actions affecting retention.
- 1.2.3.4.10. Establish the UCA of the Year Award Program at base level.
- 1.2.3.4.11. Coordinate with MPF to obtain a monthly vacancy list.
- 1.2.3.4.12. Maintain a retention interview suspense control system and provide UCAs with a roster identifying members with an ETS within 12 months to assist UCAs in scheduling interviews between members and supervisors and commanders, and career planning briefings.
- 1.2.3.4.13. Identify negative trends and career irritants, and recommend possible resolutions. Forward items of national interest to ANG/MPPAR. (Examples are: lack of meaningful work, inadequate training, poor leadership support, poor communication, lack of family or employer support, lack of advancement opportunities, etc.)
- 1.2.3.4.14. Develop material relating to career motivation for use at commander's call, prior to ETS briefings that are conducted by UCAs, and other informational opportunities.
- 1.2.3.4.15. Keep a record of all losses for use in preparing loss analysis reports. This record should include, as a minimum, Name, SSN, gender and race, AFSC, Unit, Career Status (1st Term, Mid-career, or Career), reason for separation, gaining unit/component (if conditional release), and other remarks of value.
- 1.2.3.4.16. Serve as the base-level OPR for the ANG Incentive Program to include eligibility and availability of funds certification. (ROMs only, NOT GSU Recruiting/Retention NCOs.)
 - 1.2.3.4.16.1. Maintain a case file for each incentive program participant. These files should be kept for 1 year after bonus termination or after member separates from unit.
 - 1.2.3.4.16.2. Ensure members who separate, transfer to a non-bonus AFSC, or accept a permanent full-time (AGR or technician) position are promptly terminated from the bonus program.
 - 1.2.3.4.16.3. The recruiting office should ensure a completed ANG Incentive Program Eligibility Verification Worksheet (attachment 7) is forwarded to the ROM for determination of incentive program eligibility, prior to commitment of incentive funds.
 - 1.2.3.4.17. Ensure information on benefits and services available, to include Army Air Force Exchange Systems (AAFES), commissary, and other base facilities, and information on educational benefits and services are provided to unit members as appropriate.
 - 1.2.3.4.18. Ensure accurate and timely update of MGIB eligibility; and see that information pertaining to MGIB entitlements is made available to unit members.
 - 1.2.3.4.19. Act as the liaison for Family and Employer Support Programs. Will coordinate with MPPAR and NGB-FP (in the case of Family Support Programs), and will make sure that these programs are active within the unit.
- 1.2.4. Unit level:
 - 1.2.4.1. The squadron or flight commander is responsible for establishing and maintaining the unit Career Motivation Program (CMP) with assistance from the ROM and UCA. The following actions by the squadron or flight commander will make sure an effective unit level retention program is in place; and together with appropriate training, meaningful work, and recognition, will increase the likelihood of membership satisfaction.

1.2.4.1.1. Appoint a mid-career or career NCO to the additional duty position of UCA. No other additional duties should be given to the UCA, as the duties of a UCA are involved and time consuming. The number of UCAs appointed should be adequate to serve the size of the squadron or flight (one UCA per every 50 enlisted members is suggested). The ROM will maintain letters of appointment signed by the commander.

1.2.4.1.2. Conduct an initial interview with personnel according to procedures in chapter 2.

1.2.4.1.3. Conduct reenlistment interviews according to procedures outlined in chapter 2. Approve or disapprove all non-retirement eligible enlisted members for reenlistment 6 months before Expiration Term of Service (ETS). (Retirement eligible members will be processed according to ANGI 36-2606, Selective Retention of ANG Officer and Enlisted Personnel.)

1.2.4.1.4. Conduct an annual squadron or flight climate assessment, with the help of the UCA or ROM, and evaluate potential problem areas and initiate corrective action as necessary.

1.2.4.1.5. Submit a deserving UCA for the base-level UCA of the Year Award, when appropriate.

1.2.4.2. The UCA executes the unit CMP. The UCA will keep the unit commander informed on all aspects of the CMP through commander/UCA meetings and/or as a member of the unit commander's advisory committee. The UCA will:

1.2.4.2.1. Attempt to ensure career motivation issues/irritants are addressed at the lowest level (supervisor, first sergeant, commander, etc.) prior to referral to ROM. Documentation should be accomplished when appropriate.

1.2.4.2.2. Conduct annual career planning briefings to see that members approaching ETS are provided information on the most current ANG benefits and entitlements that may affect their career plans. This information should be provided prior to the commander's reenlistment selection interview. The ROM will provide a roster to help UCAs identify members involved and may supplement the briefing with appropriate printed materials.

1.2.4.2.3. Keep informed on opportunities and benefits available to ANG enlisted members such as training requirements, retraining options, incentive program eligibility, civilian and military education opportunities, and other benefits and services available to members and their families.

1.2.4.2.4. Provide career motivation information and assistance to the unit commander and supervisors.

1.2.4.2.5. Conduct Interview Program administration as outlined in paragraph 2.1.1.

1.2.4.2.6. Maintain NGB Form 173, Record of Retention Interviews, for all enlisted members with up to 20 years total military service, based on pay date. Instructions for use and maintenance of the NGB Form 173 are detailed in paragraph 2.1.3.

1.2.4.2.7. May conduct exit interviews and administer exit surveys as determined by the ROM.

1.3. Selecting Retention Personnel:

1.3.1. Selection of the Recruiting/Retention Superintendent (RRS). The Executive Support Staff Officer (ESSO) at the State Headquarters is the selecting official for this position, with approval from the Adjutant General (AG).

Specialty qualifications are as follows:

1.3.1.1. Must have performed duties in recruiting (SDI 8R0X0) and/or as a ROM for a total period of 24 months. Must possess overall knowledge of ANG recruiting and retention programs, and have demonstrated the capability of maintaining ANG recruiting and retention standards and goals.

1.3.1.2. Must be a master sergeant or a senior master sergeant; and must have completed the Senior NCO Academy, at least by correspondence, prior to assuming duties as a RRS.

1.3.1.3. Must have completed or will complete within 1 year, Recruiting School, the Retention Course, and the Force Management Course.

1.3.1.4. Must be willing to work long, irregular hours and become involved in civic and military activities, and be subject to intense public scrutiny.

1.3.1.5. A favorable military image in compliance with AFI 36-2903, Dress and Personal Appearance, ANGI 40-501, ANG Physical Fitness Program, and NGR (AF) 35-11, ANG Weight Management Program, is mandatory.

1.3.2. Selection of the Retention Office Manager (ROM). The RRS will assist the DP in the selection of the ROM. The selection will be subject to approval by the wing commander. In addition to the requirements in ANGI 36-2602, ANG Recruiting Expenditure and Management of Recruiting and Retention Programs, selectees must meet the following:

1.3.2.1. Special duty identifier (SDI) 8R0X0 or AFSC 3S0X1 as a primary or secondary AFSC is desirable.

Applicants from other career fields may be considered and should be well qualified in counseling, leadership, management, administrative procedures, and computer familiarization.

1.3.2.2. Knowledge of the ANG organization, history, mission and career field organizational structure is mandatory. In addition, knowledge of personnel policies and procedures is desirable.

1.3.2.3. Appearance must project a favorable image of the ANG. Compliance with AFI 36-2903, ANGI 40-501, and NGR (AF) 35-11 is mandatory.

1.3.2.4. Authorized rank is technical sergeant through master sergeant. Must have completed the NCO Academy, at least by correspondence, prior to assuming duties as a ROM.

1.3.3. Selection of the Unit Career Advisor (UCA). Unit commanders should appoint at least one UCA for every 50 assigned enlisted members. It is typically more effective for UCAs to be mid-career or career NCOs, in grades staff sergeant through master sergeant. The UCA should be a volunteer whenever possible. It is best not to appoint first sergeants, recruiters, and NCOICs of work centers as UCAs.

1.4. Retention Training. ROMs are required to complete the ANG Retention course within 1 year of appointment. A UCA Outreach Course may be requested to be conducted at the unit. Retention courses may be attended as refresher training as well, provided it has been 3 years since last attended.

1.5. ROM and UCA Assignment:

1.5.1. ROM. The Retention Office Manager is the program manager for base level retention programs. It is imperative that ROMs not be assigned additional duties not directly related to retention.

1.5.2. UCA. The UCA manages the unit CMP as an additional duty. Again, it is best that no other additional duties be assigned.

Chapter 2

ANG RETENTION PROGRAMS

2.1. Career Motivation Program:

2.1.1. Retention/Career Interviews. Career discussions, interviews, and reviews should be ongoing. However, there are specific times when gathering career information will assist in force management planning and will aid the member in reaching his/her career goals. As a minimum, interviews fall into five categories: initial, annual, reenlistment, follow-up, and separation request interviews (see table 2-1.). Retention interviews are to be conducted as follows. The Unit Career Advisor (UCA) will file a copy of each NGB Form 173-1, Retention Interview Form, in the member's individual NGB Form 173, Record of Retention Interviews.. Information copies of the NGB Form 173-1 will be forwarded to the ROM.

2.1.1.1. Initial interview. The unit commander will conduct this interview as soon as possible, but not later than 3 months following the member's enlistment (prior service) or the member's return to the unit following IADT (non-prior service).

2.1.1.1.1. This interview is intended to introduce the unit commander and provide an understanding of local and ANG policy, member and unit expectations, and address any issues or concerns the member may have.

2.1.1.2. Annual interview and review. The member's immediate supervisor will conduct and document this interview annually. (Interviewing members with over 20 years' service is optional.) Interviews will be conducted not more than 60 days before nor less than 30 days after the due date (member's enlistment/reenlistment anniversary date).

2.1.1.2.1. This interview will provide an opportunity to review the member's ANG career progression, re-evaluate goals and expectations, and career path. In addition, this is the time to identify and address specific areas of concern, ANG opportunities, benefits, and services, spouse and/or family support and involvement, employer support, and other military or non-military influencers on the member's ANG career. Follow-up action may be accomplished by the UCA or the ROM as necessary. The UCA will not conduct the annual interview for other than those members for whom he or she is the immediate supervisor.

2.1.1.2.2. The interviews will be recorded on the NGB Form 173-1 and forwarded to the UCA to be filed in the member's NGB Form 173.

2.1.1.3. Reenlistment Interview. At least 6 months before a member's ETS, The commander will conduct a reenlistment recommendation interview with each enlisted person who is not retirement eligible at ETS. Follow-up interviews by the UCA and/or the ROM may be required until reenlistment or separation occurs. Documentation of this interview will serve as a record of the member's intent to reenlist at ETS as well as the unit commander's selection for reenlistment. Signatures of both the member and the commander, with the date of the interview, are required. Commanders of large units may delegate this duty to the deputy commander.

2.1.1.4. Follow-Up Interview. The ROM or UCA will conduct follow-up interviews as requested by the commander and/or supervisor, and when an individual is recommended for reenlistment but is undecided or expresses a desire to

2.1.1.4. (Cont) separate. The ROM or UCA should try to overcome any obstacles to reenlisting that the member may feel exists; and should ensure the member is aware of, and understands the benefits they will be losing if they separate. If appropriate, cross-training should be explored; and/or the availability of positions in other ANG units. The NGB Form 173-1 will be annotated and placed in the member's NGB Form 173. An information copy of the NGB Form 173-1 will be forwarded to the commander.

2.1.1.5. Separation Request Interviews. Prior to submitting a written request for separation (prior to ETS), the member should review the cause for the request with his or her immediate supervisor and UCA. However, the ROM will conduct interviews with members who request to be separated prior to their ETS. Members requesting to be separated will be referred to the ROM for interview and processing of request.

2.1.1.5.1. The purpose will be to determine reasons for request, attempt to overcome obstacles to remaining in the unit, pursue conflict resolution, discuss alternatives, and assist the member in relocating to another ANG unit when appropriate. In addition the ROM will ensure the member understands how separation will affect the member's ANG benefits and entitlements, including possible recoupment of unearned payments under the Incentive Program and/or Montgomery GI Bill (MGIB).

2.1.1.5.2. If the member's issues cannot be resolved, the ROM will advise the member of documentation required to support the request for separation in accordance with applicable directives or regulations.

2.1.1.5.3. This interview will be documented and be included in the member's NGB Form 173 with recommendations to the commander. An information copy of the ROM's recommendation to the commander will be forwarded to the RRS. The NGB Form 173 will then be forwarded to the commander, along with the member's letter of request, for approval/disapproval.

2.1.1.5.4. Following receipt of the member's letter, the unit commander will review the request and the ROM's report and recommendations. The commander may want to personally interview the member at this time. The unit commander will provide an endorsement to the letter, and forward the request package through appropriate channels, and back to the ROM.

2.1.1.5.5. The ROM will notify the member of approval/disapproval, and if approved, will forward request package to Personnel Relocations, MPF. The ROM will take action to terminate the member's participation in the Incentive Program and/or MGIB, if applicable.

Table 2.1. ANG Retention Interview Schedule

R U L E	If individual is	Conduct the interview within the specified time frame	Action Officer
1	A newly assigned member	INITIAL PS - following enlistment NPS - following return from IADT	Unit Commander
2	A member with under 20 years' service	ANNUAL Within 60 days before or 30 days after the member's enlistment/reenlistment anniversary	Supervisor
3	An enlisted member who is not retirement eligible	REENLISTMENT SELECTION 6 months before ETS	Unit Commander
4	A member who is undecided or intends to decline reenlistment/extension at ETS	FOLLOW-UP Not less than 3 months before ETS	ROM (Personnel Technician or UCA at GSUs)
5	A member who has requested to be separated prior to ETS	SEPARATION Prior to the commander's approval/disapproval (NGB Form 173 with comments/ recommendations will be forwarded to commander)	ROM

2.1.2. Retention Interview Program Administration. The ROM will maintain a suspense control system for tracking interview actions.

2.1.2.1. The ROM will provide UCAs with interview forms a minimum of 2 months before the scheduled interview.

2.1.2.2. The UCA will provide the NGB Form 173-1 and the NGB Form 173 to the appropriate supervisor or commander a minimum of 1 month prior to the scheduled interview month. The UCA will maintain a suspense control for tracking interview actions.

2.1.2.3. When NGB Forms 173 are returned from the supervisor or commander, the UCA will review remarks for any necessary follow-up or referral actions.

2.1.2.4. In the case of reenlistment interviews, the unit commander will use the NGB Form 173-1 to document the member's intent to reenlist/extend at ETS as well as the commander's reenlistment recommendation. The commander will return the annotated interview form to the UCA.

2.1.2.5. In the case of reenlistment interviews, if there is a requirement for follow-up action by the ROM, the UCA will forward the member's NGB Form 173 to the ROM, not later than the fourth month before the member's ETS. (Follow-up is required for member's who are selected for reenlistment, but who have not made a decision to reenlist, or have indicated that they will not reenlist.) The ROM, or GSU career advisor, will conduct required follow-up and notify the MPF of any projected reenlistment or separation.

2.1.2.6. A copy of the completed NGB Form 173-1 must be returned to the Retention Office Manager, not later than the next UTA following the interview date. The ROM will clear the interview suspense and assist the UCA with follow-up action when necessary.

2.1.3. NGB Form 173, Record of Retention Interviews:

2.1.3.1. NGB Form 173-1, Retention Interview Form. The NGB Form 173-1 is to be used as the official form to document interviews. This form may be computerized, but if used in this format, will not be reduced in content. Original annotated interview forms will be maintained by the UCA in NGB Form 173. When interview forms are no longer required, they may be given to the member or destroyed according to AFI 37-138, Records Disposition, - Procedures and Responsibilities. .

2.1.3.2. Use and Maintenance of NGB Form 173. NGB Form 173 provides a standardized file for maintaining individual retention interviews and supporting documents.

2.1.3.2.1. It is initiated by the ROM at the time the member enlists.

2.1.3.2.2. It will be maintained at the member's unit of assignment by the UCA.

2.1.3.2.3. It is sent from the UCA to the ROM for follow-up action, if required, after the reenlistment interview. When the commander has recommended the member for reenlistment and the member indicates intent to separate, or is undecided on reenlistment at ETS, the ROM will conduct and document a follow-up interview. No follow-up action will be taken if the commander has not recommended the member for reenlistment. The ROM will maintain the NGB Form 173 until the member reenlists, or is transferred, separated, or discharged. At that time, the ROM will:

2.1.3.2.3.1. Return the member's NGB Form 173 to the UCA in the member's unit of assignment, or give the NGB Form 173 to the member upon separation or discharge, or

2.1.3.2.3.2. Send the member's NGB Form 173 to the gaining unit's ROM when the member moves or transfers to another State and/or unit of the ANG.

2.1.4. Instructions for NGB Form 173:

2.1.4.1. SECTION I. The date of interview and type of interview (initial, annual, reenlistment, separation, etc.) should be annotated by interviewer. The member being interviewed will sign and initial in appropriate blocks.

2.1.4.2. SECTION II. This section is used to record a member's interests and hobbies. This information may be of value in creating a common ground when opening an interview.

2.1.4.3. SECTION III. These subjects are not all-inclusive. Additional subjects, such as incentive program requirements or restrictions, may be added.

2.1.4.4. SECTION IV. Interview Documentation:

2.1.4.4.1. File all NGB Forms 173-1 appropriately annotated following each interview, in this section. Maintain a separate form for each required interview. Follow-up interview documentation may be added to the applicable interview record to ensure continuity. Remarks should be brief and concise statements. Arrange the documents contained in this section with the most current item to the front.

2.1.4.4.2. Record only information in this section that will be of value to future interviewers concerning the member's awareness of options, goals, comments and decisions that affect his or her career.

2.1.4.4.3. With the exception of documentation relating to nonselection for reenlistment, this record will not be a repository of unfavorable information or disciplinary counseling.

2.2. Retention Measurements. When the retention or reenlistment rate is below 90 percent, it should be concluded that many desirable members are leaving. Commanders, supervisors, ROMs, and career advisors must be alert to possible irritants which affect the retention of desirable members. A low retention or reenlistment rate may be the result of not taking a keen enough interest in the people. Ineffective training, poor utilization, and other factors perceived as obstacles to a successful ANG career may also contribute to low retention or reenlistment rates. The following retention metrics will assist in evaluating organizational success. Units will be compared nationally using the following criteria. States and units are encouraged to use the same measurements. The ESSO, DP, and RRS should monitor retention and reenlistment rates published by the ROM for all units, including GSUs.

2.2.1. Retention Metrics. The ROM should use statistical analyses, surveys and other instruments to identify factors affecting retention, and compile findings and recommendations for use by commanders. The ROM will brief the wing commander, the DP, and the RRS, on concerns and conditions affecting retention at least quarterly.

2.2.1.1. Strength Effectiveness Rate. Compares authorized versus assigned strength and applies a cost factor for unit vacancies based on an annualized member cost factor.

- a. Unit Strength Authorized = 100.
- b. Unit Strength Assigned = 90.
- c. Unit Vacancies = 10 (even if some people are excess).
- d. Unit Strength Percent = 90% (b divided by a).
- e. Unit effectiveness: Green - 95% or greater.
 Yellow - 90 to 94%.
 Red - 89% or less.
- f. Unit under execution cost: (Vacancies under 95% of UMD multiplied by annualized cost factor).
 100 authorizations x 95% = 95 - 90 assigned = 5 vacancies under 95%.
 5 x \$2415 = \$12,075 unit cost the ANG in under execution of authorized strength (\$2415 is FY 94.
 individual cost factor).

Figure 2.1. Computing Strength Effectiveness

2.2.1.2. Reenlistment Effectiveness Rate. The reenlistment rate is calculated by dividing the number of airmen who actually reenlist or extend at ETS by the number who are eligible to reenlist or extend. Members not selected for reenlistment by their unit commander are not included in the calculation. Reenlistment effectiveness rates should be calculated for the overall unit, by gender and by race and ethnic group.

Total at ETS = 20
 Total selected for reenlistment by commander = 16.
 Total reenlisted/extended = 14.
 14 divided by 16 = .875 (87.5%).

Overall reenlistment rate = 87.5% for this period - Green.

Unit service demographics (good years for retirement):
 0-6 years = 18 divided by 100 (total unit authorized) = 18%.
 7-12 years = 42 divided by 100 = 42%.
 13-19 years = 20 divided by 100 = 20%.
 20+ years = 20 divided by 100 = 20%.

Eligible breakdown selected by commander (total = 16/14 reenlisted):
 0-6 years = 4 eligible, 3 reenlisted (75% - Yellow).
 7-12 years = 6 eligible, 6 reenlisted (100% - Green).
 13-19 years = 5 eligible, 5 reenlisted (100% - Green).
 20+ years = 1 eligible, 0 reenlisted (0% - Red).

Unit effectiveness:

	Overall	0-6	7-12	13-19	20+
Green =	86.25%	80%	90%	95%	80%
Yellow =	81.25%	75%	85%	90%	75%
Red =	Anything below Yellow percentages.				

Figure 2.2. Computing the Reenlistment Effectiveness Rate.

2.2.1.3. Loss Management Effectiveness Rate. Losses of qualified unit members cost the Air National Guard money. Managing the loss rate reduces the cost of training and keeps valuable personnel resources to meet the mission of each unit. Although losses are expected, non-projected losses have the greatest cost. Projected losses are planned replacements and do not normally have the same mission readiness effect. Loss management effectiveness rates should be computed for the overall unit, by gender and by race and ethnic group.

Cost Factors (good years for retirement):		
0-6 years = \$34,000 per person.		
7-12 years = \$70,000 per person.		
13-19 years = \$104,000 per person.		
20 + years = \$52,000 per person (cost reduction for full career).		
NOTE: Cost factors based on expected training costs. Does not include clothing, travel, per diem, instructor cost, etc.).		
Projected loss cost factors:		
	Projected	Not Projected
Retirement	Zero	20%
ETS	Zero	50%
Prior to ETS	75%	100%
For Cause	Zero	75%
NOTE: Factors are based on projected losses prior to ETS being controllable by the unit and allowing separation prior to completion of the individual's contract. Not projected factors based on whether or not the individual completed a contract or not. For cause separations should always be projected, as they are unit initiated.		
Computations:		
Total unit authorized = 100.		
Total unit losses = 10 (Loss percent = 10 divided by 100 = 10% - Green).		
0-6 years = 3 (1 ETS projected, 2 prior to ETS not projected).		
7-12 years = 2 (1 ETS not projected, 1 for cause not projected).		
13-19 years = 1 (1 prior to ETS projected).		
20 + years = 4 (3 retirement projected, 1 retirement not projected).		
Costing:		
0-6 years = 0 + (2 x \$34,000 x 100%) = \$68,000.		
7-12 years = (\$70,000 x 50% = \$35,000) + (\$70,000 x 75% = \$52,500) = \$87,500.		
13-19 years = \$104,000 x 75% = \$78,000.		
20 + years = 0 + (\$52,000 x 20%) = \$10,400.		
Total cost of losses = \$243,900 - Red.		
Unit Effectiveness:		
	Percent of Total Authorized	Total Cost
Green	10% or less	\$105,000 or less*
Yellow	11-15%	\$157,500 *
Red	over 15%	over \$157,500*
* NOTE: Total cost should be computed by multiplying total losses by 15% and multiplying that product by \$70,000 to determine "green" cost. Yellow cost is green cost multiplied times 1.5.		

Figure 2.3. Computing Loss Management Effectiveness

2.3. Retraining Requests. ROMs will provide assistance to members desiring to retrain. The ROM will assist members in coordinating with MPF or recruiting to identify unit manning document (UMD) vacancies. A vacancy listing compiled by the MPF should be made available monthly to ROMs. The ROM should be made aware of excesses and vacancies so they can assist unit commanders and UCAs in the reassignment of members in excess status. The ROM will review all retraining applications for possible impact on bonus participation. Every attempt will be made to retrain members into critical AFSC vacancies.

2.4. Newcomer's Orientation/Sponsorship. The ROM will ensure that a Newcomer's Orientation/Sponsorship Program is conducted at the unit for newly enlisted members. Retention begins the day a person enlists; and an effective orientation and sponsorship program is important to future success.

2.4.1. As a minimum, new members should be briefed on the mission of the ANG as well as the specific State and unit mission, and ANG and State benefits and services available. New members should be aware of the functions of offices such as the Chaplain, IG, Social Actions, Education, Finance, Personnel, and the Family Program.

2.4.2. Gaining units should assign sponsors to new members to ensure smooth in-processing and transitioning into the unit. Sponsors should assist the new member with in-processing and be available to help the new member throughout the first year.

2.5. Exit and Periodic Surveys and Interviews. Exit and climate surveys and interviews are excellent tools for determining the actual reasons members choose to separate from the ANG, for discerning important trends, and for imparting an impression of care and concern.

2.5.1. The ROM will ensure that all members separating from the unit complete an exit survey and interview. (See attachment4 for sample survey.) A quarterly report compiling findings from exit surveys will be forwarded to DP, unit commanders, base SEA, wing commander, state SEA, RRS, and the Human Resource Force Manager (HRFM). Information on the top five reasons members separate according to exit reports will be reported on the ANG 599R (see attachment2) and forwarded to ANG/MPPAR in accordance with paragraph 2.9.3. of this instruction. Rather than determining the validity of the comments and scoring on surveys, the report should give information to commanders that will alert them to possible concerns and trends. Any immediate concerns, as well as negative trends found in exit surveys, should be addressed through channels as appropriate.

2.5.2. The ROM will conduct periodic surveys to determine the state of the retention climate within the units. Again, a report compiling findings will be forwarded to unit commanders, the wing commander, SEA, DP, RRS, and the HRFM. Immediate concerns, negative trends, as well as information on what keeps members satisfied, should be included in reports.

2.6. Family and Employer Support Programs. It is extremely important to foster family, employer, and community support for the activities of our ANG members. Fostering such support by communicating with and involving families and employers will enhance readiness. Creating and advocating such programs will promote stronger, more positive partnerships between the ANG and the members' families, civilian employers, and the community at large.

2.6.1. Family Support. The ROM will act as the unit POC, in conjunction with the State Family Program Coordinator (SFPC), for the Family Support Program and will carry out duties IAW ANGR 211-1/NGR 600-12, National Guard Family Program. In addition, the ROM or other command designee is encouraged to attend annual Family Program Workshops and training provided by their State and those sponsored by NGB-FP. As a minimum, the ROM, with coordination from the DP, the RRS and the SFPC, will:

2.6.1.1. Encourage participation of unit members, family members, retirees, and others in the Family Program, and ensure the opportunity for training.

2.6.1.2. Ensure an information briefing for families is held at least once per year.

2.6.1.3. Ensure a family appreciation/recognition event is held once per year.

2.6.1.4. Ensure commanders are aware of requirements IAW ANGR 211-1/NGR 600-12...

2.6.1.5. Act as liaison for families, commanders, the SFPC, and ANG/MPPAR on all family program matters.

2.6.1.6. Act as the unit manager and resource advisor for Family Program Funds. A quarterly report on expenditures will be forwarded to the SFPC, the DP and the RRS NLT 30 days after the end of each quarter. Format for this report will be determined by the SFPC.

NOTE: It is not the ROMs responsibility to carry out all programming ideas, but rather the intent is for the ROM to be the conduit that ensures effectiveness of the program. The ROM ensures that the volunteers have the resources they need, and refers volunteers and other family members to agencies and other sections within the ANG when appropriate. If a family program does not exist, it will be the responsibility of the ROM to see that that a family program is initiated. When it is in place, the ROM will allow volunteers to determine the direction of the program and family events/activities in conjunction with command directives.

2.6.2. Employer Support. The ROM will act as the Employer Support POC for the unit. Again, as in the Family Program, the ROM is not responsible for carrying out any and all employer support events/activities, but rather will act as the POC for information and referrals. The ROM will be the POC for commanders, NGB, and ANG. As a minimum ROMs will, IAW DODD 1250.1, Subject: National Committee for Employer Support of the Guard and Reserve:

2.6.2.1. Assist the commander in developing policies, establishing guidance, and procuring resources necessary to implement and promote employer support programs.

- 2.6.2.2. Ensure employer support information on employment and reemployment rights is included in mobility folders as a routine part of actual and simulated mobilization exercises.
- 2.6.2.3. Ensure communication between the unit and employers. Information about mission and deployments, as well as recognition of unit members can occur through base and civilian newsletters, etc.
- 2.6.2.4. Ensure the employer support programs are evaluated as part of normal inspection, evaluation, and assistance programs.
- 2.6.2.5. Ensure Guard members are aware of their responsibilities to their employers.
- 2.6.2.6. Ensure members are aware of the services provided by the National Committee for Employer Support of the Guard and Reserve.

2.7. UCA Management Program. Assignment as a Unit Career Advisor (UCA) is an additional duty; however, it is an extremely important function as the UCA is the eyes and ears of the unit commander. Retention Office Managers should take great care in managing UCAs, to include selection, guidance, training, and recognition.

2.7.1. UCA Selection. UCAs are appointed by the unit (squadron or flight) commander with recommendation by the first sergeant. First sergeants need to take an active role in the UCA selection and appointment process, as first sergeants are in a position to know the unit members, and know which will be most effective in this role. The right appointment can make a positive impact on retention. -2.7.1.1. UCAs should be in the rank of staff sergeant through master sergeant, and should not be section chiefs. In addition, first sergeants and recruiters will not be assigned the duties of a UCA.

2.7.1.2. When at all possible, the UCA should be one who is a good listener, who can remain impartial, and who others find easy to talk to; someone who people naturally “gravitate” to. Above all else, the UCA should be someone who wants the job. (See position description in attachment 5.)

2.7.1.3. UCAs will not be assigned other additional duties.

2.7.2. UCA Training. ROMs will ensure that newly assigned UCAs are trained by spending one-on-one time with them, and whenever possible, through the UCA Outreach Course. The ROM will conduct periodic training with all UCAs at least quarterly. This is typically accomplished by meetings with UCAs quarterly, and a day-long training meeting annually, with guest speakers from appropriate sections/agencies (these annual training meetings are often set up on off-drill weekends). In addition, the ROM will perform Staff Assistance Visits (SAVs) on each squadron/flight at a minimum of every 2 years, or more often if needed, using the attached checklist (attachment 5) as a guideline. UCA SAVs are conducted to provide an opportunity for training, and to supply appropriate feedback to commanders about the effectiveness of their retention programs. ROMs will also ensure that UCAs have updated information as needed.

2.7.3. UCA Recognition. Because the duty as a UCA is an additional duty, and a very time consuming one at that, it is important to recognize their efforts. ROMs will, therefore, initiate a UCA Recognition Program that should, as a minimum, recognize a “UCA of the Year” (quarterly awards are desirable). Commanders will nominate; however, the ROM and RRS will make the recommending selection. Recommendations for annual awards will be forwarded through appropriate channels, including the RRS and AG, to ANG/MPPAR, to be considered for the Air National Guard UCA of the Year Award. (See ANGI 36-2802, Special Trophies and Awards.)

2.8. Retention Plan. The ROM will publish and forward an annual retention plan to the DP and RRS as required. The following outlines the minimum that should be included in writing a retention plan.

2.8.1. Objectives and Goals. Areas to consider are:

2.8.1.1. Retention metrics.

2.8.1.2. Projected losses.

2.8.1.3. Growth/conversions/downsizing.

2.8.1.4. Areas of concern/special interest.

2.8.1.5. Minority metrics.

2.8.1.6. Cross-training capability/opportunities.

2.8.1.7. Training (ROM/UCA).

2.8.1.8. Advertising and publicity.

2.8.2. Planned Activities. Examples are:

2.8.2.1. Awards and recognition programs.

2.8.2.2. Family programs/events.

2.8.2.3. Employer supported programs/events.

2.8.2.4. UCA training/seminars.

2.8.2.5. SAV plan/schedule.

2.8.2.6. State/regional recruiting and retention workshops.

2.8.3. Retention Budget. Needs to consider (refer to ANGI 36-2602, ANG Recruiting Expenditure and Management of Recruiting and Retention Programs.)

2.8.3.1. Local literature/brochures/reproduction.

2.8.3.2. Retention recognition items.

2.8.3.3. Training costs.

2.8.3.4. Awards (UCA, Top Boss, Commander of the Year).

(Note: Funds from MPPAR cannot support Family Program activities, as separate funds are available for these programs. In addition, funds approved cannot be used for food items.)

2.8.4. Incentive Program. A plan for administering the incentive program is essential as funds are allocated based on need. Consideration will be given to prior expenditures, unit strength, special needs, and plans for execution. In addition, plans should include estimates for each incentive program (NPS Bonus, PS Bonus, SLRP, Medical, etc.), and a tentative list of eligible AFSCs.

2.9. Retention Operating Budget:

2.9.1. ROMs may request funds to support retention operation costs. Requests must be coordinated through the DP and RRS and forwarded to MPPAR no later than 15 February of the year prior. RRSs should consider the retention plan when validating requests.

2.9.2. No funds will be obligated until the RRS receives notification of budgetary ceilings from MPPAR.

2.9.3. The ANG 599R, Retention Budget & Loss Report (attachment 2), will be submitted quarterly through the DP and RRS, to arrive at MPPAR no later than the 10th day of each new quarter.

2.9.4. Requests for additional funds will go through the RRS for validation, and forwarded to MPPAR. Requests must be fully justified. Retention plans and past execution will be considered.

2.10. Advertising and Publicity:

2.10.1. Advertising Materials. The Retention Office Manager should coordinate with the Recruiting Office Supervisor (ROS) or the State Recruiting and Retention Superintendent (RRS), to order national retention advertising materials to be placed throughout the units. Funds may be used to support locally developed materials.

2.10.2. Benefits and Entitlements. The ROM should also ensure that members receive timely information on ANG benefits and entitlements, and other pertinent information, by holding periodic briefings, and by placing articles in base papers, unit newsletters, bulletins, etc.

Chapter 3

ANG ENLISTED INCENTIVE PROGRAMS

3.1. Incentives. Enlisted incentives are authorized for traditional ANG members who enlist or reenlist in selected critical AFSCs. Incentives are viewed as only a part of the ANG Retention Program and are to be used primarily to control personnel inventories. ANG enlisted incentives are divided into specific types with each type having its own eligibility requirements, amount of payment and, in some cases, unique administrative procedures as described in this chapter. States which require ANG membership by State employees paid from O&M funds as a condition of employment should view these employees the same as military technicians when considering incentive eligibility. Incentive categories and the amount of the incentive (within DoD limits) will be established by ANG/MPPAR and approved by ANG/MPP.

3.2. Incentive Program Authorization. When incentive funds are available, each State headquarters may authorize incentive participation in identified "wartime critical" AFSCs according to AFI 10-201, Status of Resources and Training System, Table 4.4; AFI 10-201/ANG Supplement 1; and ANG/MPP published procedures. Where these procedures are in conflict with this regulation, the published procedures will prevail. Published procedures (log letters, etc.) pertaining in any way to the ANG Incentive Program will be kept on file for a minimum of 7 years. Submit requests to modify published procedures of this instruction, with full justification, through channels, to ANG/MPPAR. No change in policy or published procedures will be made without ANG/MPPAR approval.

3.2.1. The Retention Officer Manager (ROM), together with the State Recruiting and Retention Superintendent (RRS), and the Recruiting Office Supervisor (ROS), will publish an incentive eligible AFSC list for enlistment incentives (CATEGORY I) with appropriate commander input. This list will include no more than ten AFSCs per wing, and an additional two for each Geographically Separated Unit (GSU). (Example: a wing with one GSU may have 12 AFSCs on their Category I list. Six AFSCs on the list could be in the GSU, or two, or even none, but the total number of AFSCs on the list may still be 12.)

3.2.1.1. Waivers to include additional AFSCs on the Category I list may be considered by MPPAR if well justified.

3.2.2. A list for reenlistment incentives (CATEGORY II) may be unlimited; however, the AFSCs must come from AFI 10-201 and AFI 10-201/ANG Supplement I, must be reported under the unit's SORTS procedures, and should be planned according to budgetary allocations.

3.2.3. All qualifying Non-Prior Service enlistees, Prior Service enlistees (to include those qualifying for the Affiliation Bonus), and reenlistees in the five most critical and hard-to-fill DAFSCs may elect both a cash bonus and the Student Loan Repayment Program (SLRP).

3.2.3.1. The five most critical and hard-to-fill DAFSCs should be the same on both the CATEGORY I and the CATEGORY II list.

3.2.3.2. In all other cases, an individual may elect to participate in the SLRP in place of a cash bonus, when funds are available. This election will be irrevocable "except for circumstances over which the member had no control."

3.2.3.3. Any changes to the five most critical AFSCs may not be made without prior approval from MPPAR, as these AFSCs should remain critical for the entire year (historically and chronically critical).

3.2.4. Changes to the remaining AFSCs on the CATEGORY I list may be made, with approval by the RRS, no more than once per quarter. A copy of any adjustments to this list will be forwarded to MPPAR.

3.2.5. In addition, States may limit the incentive programs based on needs of the unit. In other words, States may elect to offer non-prior enlistees the SLRP only, and cash or SLRP for all other incentive categories. Or a unit may choose not to offer the affiliation or the \$5,000 bonus at all. The incentive program should be tailored to best meet the needs of the particular unit.

3.2.6. The AFSC Lists will be kept on file for a minimum of 7 years.

3.2.7. The RRS will forward a letter to MPPAR, NLT 30 October of each fiscal year, outlining their respective State's incentive program.

3.2.7.1. This letter should include all CATEGORY I AFSC lists from ROMs within their State; should reflect the five AFSCs eligible for both cash and SLRP; which AFSCs are eligible for the \$5,000 bonus if applicable; and the programs each wing plans to participate in and incentive amounts being offered.

3.2.7.2. States electing to not pay initial cash bonuses are asked to submit a negative report.

3.2.7.3. Incentive program status reports (see paragraph 3.11) must also be accomplished by the ROM monthly, and must be forwarded to MPPAR with an information copy to the RRS, not later than the 10th of the following month. RRSs should ensure that ROMs are accomplishing these reports, as future funding depends on accurate and timely reporting of expenditures. States/units not forwarding these reports risk losing incentive funding for the remainder of the year, or for future years.

3.2.7.4. Annual retention plans, to include incentive program needs, must be forwarded to the RRS for validation. The RRS will forward budgetary requests for the next FY to MPPAR NLT 15 March of the current FY.

3.2.8. An airman who enlists in an incentive eligible AFSC with a base level UMD assigned strength exceeding 110 percent including the incumbent, (or less if established by ANG/MPPAR), at the time of enlistment, is not eligible for incentive consideration. For purposes of clarity, unless otherwise directed by ANG/MPP, the terminology "valid vacancy or position" will refer to vacancies up to 110% manned.

3.2.9. An airman assigned to an incentive eligible AFSC may reenlist and receive an incentive (if otherwise qualified) if the individual's departure would cause the AFSC to fall below 110 percent of the base level UMD. When base-level assigned strength in the specific AFSC is excess to that authorized, a member otherwise qualified for a reenlistment incentive should be counseled by the ROM about retraining options.

3.2.10. An individual may be enlisted or reenlisted in an incentive eligible AFSC and receive an incentive if there is a documented vacancy within 24 months of assignment, and that vacancy would reduce the strength to less than 110%.

3.2.11. Members gained through PALACE CHASE or Conditional Release from another Selected Reserve Component (other than from the Individual Ready Reserve) may participate in the SLRP only. Members gained from another ANG unit under Conditional Release, who were in the ANG Incentive Program at their losing unit, continue their previously established incentive eligibility as described in paragraphs 3.7.1 and 3.7.2.

3.2.12. All enlisted bonuses, except for the Affiliation Bonus, will require a 6-year commitment in the ANG.

3.2.13. ANG members transferring from one ANG unit/State to another, who are enrolled in the incentive program and are remaining in the original AFSC for which the member qualified for the incentive program, may continue in the program, even if that AFSC is not on the gaining State/unit's incentive eligible list. However, members on a conditional release from another ANG State/unit or selected reserve component, who are not currently in the incentive program, may qualify for the SLRP only, provided all other criteria are met.

3.2.14. Members whose AFSC was not incentive eligible at the time of enlistment, may, with the commander's concurrence, reenlist anytime after the member has satisfactorily served for at least 6 months to receive a reenlistment bonus, provided the member's AFSC is now on the CATEGORY I list and all other criteria in this instruction are met. In other words, if an AFSC is critical for the unit, all members within that AFSC should have the opportunity to participate in the incentive program if otherwise qualified.

3.2.14.1. Members qualifying for this exception must not have previously received a reenlistment cash bonus for service in any component of the Selected Reserve, and must reenlist for 6 years.

3.2.14.2. A member may NOT reenlist early simply because he/she was not qualified at time of enlistment, and later becomes so.

3.2.15. Members not currently in an incentive eligible AFSC, but willing to retrain into an incentive eligible AFSC, may reenlist upon award of a 3-level in the new AFSC to qualify for a reenlistment incentive, provided the member is otherwise qualified for retraining. All other criteria as outlined in this instruction must be met as well and the member must enlist for 6 years.

3.3. Enlistment (Category I) Cash Bonuses:

3.3.1. Non-prior-service (NPS) Enlistment Cash Bonus. When funds are available, a bonus may be paid to an individual enlisting who meets all requirements listed below and executes an NGB Form 36-8, ANG Non-Prior-Service Enlistment Cash Bonus Written Agreement.

3.3.1.1. Individual must be a NPS applicant; classified as Mental Category I (93-99); II (65-92); or III (31-64); a secondary school graduate as defined in attachment 1; enlisting in an incentive eligible UMD vacancy; not enlisting to qualify for a full-time position where federal law requires membership in the ANG as a condition of employment (persons selected for a temporary position as defined in this regulation may be eligible); and enlisting for 6 years in the ANG.

3.3.1.2. Bonus payments will be made in accordance with table 3.1.

3.3.2. Prior Service Enlistment Bonus (PSEB). When funds are available, a PSEB may be paid to members who have an honorable discharge from active service, enlist in the ANG, meet all requirements listed below, and execute an NGB Form 36-9, Prior Service Enlistment Bonus Written Agreement.

3.3.2.1. Member must have completed the Military Service Obligation (MSO). If an individual with less than 8 years' service is discharged from an active component, without an IRR commitment, enlistment in the ANG revives the original MSO minus active duty time. (Exceptions: For females initially entering service before 1 February 1978; members who were 26 years of age or older before 10 November 1979 (ANGI 36-2002, Enlistment and Reenlistment in the Air National Guard and as a Reserve of the Air Force); or members discharged within 120 days of their MSO expiration date.)

3.3.2.1.1. Has less than 14 years of military service based on pay date on the date of enlistment.

3.3.2.1.2. Has not previously been paid a bonus for enlistment, reenlistment, or extension in a reserve component.

3.3.2.1.3. Is not a PALACE CHASE participant or on a Conditional Release from another selected reserve component. Members who serve in an Active Duty component, and then complete their MSO in the IRR may qualify for a prior service enlistment bonus, provided they have never served in a selected reserve component.

3.3.2.1.4. Is not enlisting to qualify for a full-time position where federal law requires membership in the ANG as a condition of employment. Persons selected for a temporary position as defined in this regulation may be eligible.

3.3.2.1.5. Is enlisting for 6 years as established by ANG/MPPAR for incentive entitlement and agrees to serve the entire enlistment in the incentive AFSC for which enlisted.

3.3.2.1.6. Is enlisting in an incentive-eligible UMD vacancy and is fully qualified with a minimum 3-skill level in that AFSC.

3.3.2.2. Bonus payments will be made in accordance with table 3.1.

3.3.3. Affiliation Bonus:

3.3.3.1. Eligibility. When funds are available, an ANG Affiliation Bonus may be paid to an enlisted person coming to the ANG from an active duty component, who meets the requirements listed below.

3.3.3.1.1. Has 180 days or less remaining on the active duty service obligation, or has completed satisfactorily any term of enlistment or period of obligated active duty service, was discharged or released under honorable conditions,

3.3.3.1.1. (Cont) and upon release from active duty has or will have a military service obligation (MSO) under Section 651 of Title 10 USC.

3.3.3.1.2. Is enlisting in an incentive-eligible UMD vacancy and holds the military grade and skill qualification commensurate with the vacancy.

3.3.3.1.3. Is enlisting for a period equal to the member's remaining MSO but not less than 3 years and executes an NGB Form 36-7, Affiliation Bonus Written Agreement.

3.3.3.1.4. Is not enlisting to qualify for a full-time position where federal law requires membership in the ANG as a condition of employment. Persons selected for a temporary position as defined in this regulation may be eligible.

3.3.3.1.5. Is not a PALACE CHASE participant or on conditional release from another selected reserve component.

3.3.3.2. Affiliation Bonus Amount Determination and Payment:

3.3.3.2.1. The bonus amount is calculated on the basis of \$50 per month for each whole month of remaining MSO. We have provided an Affiliation Bonus Payment Determination Worksheet (attachment 7) for use in calculating affiliation bonus entitlements.

3.3.3.2.2. When 18 or fewer months remain on the MSO, the entire bonus amount is payable after the member signs the enlistment contract, meets all entitlement requirements, and begins attending UTAs.

3.3.3.2.3. When more than 18 months remain on the MSO, one half of the bonus is payable after the airman signs the enlistment contract, meets entitlement requirements and begins attending UTAs. The other half is payable on the sixth anniversary of the date the MSO was incurred.

(Exceptions: If the affiliation contract was signed on or before 1 Dec 93, the remaining one-half is payable on the date of the fifth anniversary of the date the individual's MSO was incurred. If the member has more than 18 months remaining on the MSO but over 6 years active service (i.e. 6 years, 3 months) the balance is payable on the seventh anniversary.)

3.4. Reenlistment (Category II) Cash Bonus:

3.4.1. Eligibility: When funds are available, a reenlistment bonus may be paid to a member who reenlists for 6 years in an incentive-eligible UMD position and completes an NGB Form 36-6, Reenlistment Bonus Written Agreement. When base-level assigned strength in the specific AFSC exceeds 110%, a member otherwise qualified for a reenlistment bonus should be counseled by the ROM about retraining options. To qualify for a reenlistment bonus, members must:

3.4.1.1. Not currently be drawing an incentive, unless the member is within 31 days of the ETS of that incentive contract. An airman drawing an incentive, (enlistment or SLR) is ineligible to reenlist 31 to 90 days before ETS unless such reenlistment is to qualify for mandatory attendance at an in-residence training school, State educational benefits, MGIB, or unit deployment.

3.4.1.2. Have not previously received a reenlistment cash bonus for service in any Selected Reserve component.

3.4.1.3. Not be reenlisting to qualify for a full-time position where membership in the ANG is a condition of employment. Persons selected for a temporary position as defined in this regulation may be eligible.

3.4.1.4. Have at least 6 months satisfactory service before reenlistment, as documented by the member's unit commander.

3.4.1.5. Have less than 14 years of military service based on pay date on the date of reenlistment.

3.4.2. When funds are available, members who are not currently enrolled in an incentive program may reenlist at any time for the sole purpose of receiving an incentive if: they have not previously received a reenlistment incentive; their AFSC was not on the enlistment incentive list at the time of their enlistment (CATEGORY I), but now is; and they have completed IADT and at least 6 months of their current contract.

3.4.3. Reenlistment payment schedule and payment amounts are shown in table 3.1. Anniversary payments are based on commander certification of satisfactory service.

3.4.4. Retraining for reenlistment bonus qualification. A member who is not currently in an incentive eligible AFSC may reenlist after cross-training, upon award of a 3-level in the new AFSC, to qualify for a reenlistment incentive. All reenlistment qualification criteria apply.

Table 3-1. Cash Bonus Payment Schedule.

BONUS	TOTAL	INITIAL	ANNIVERSARY PAYMENTS					
TYPE	BONUS	PAYMENT	1ST	2ND	3RD	4TH	5TH	6TH
NPS	\$2,000	\$1,000	N/A	\$250	\$250	\$500	N/A	N/A
Enlistment	\$5,000	\$2,000	\$500	\$500	\$500	\$500	\$500	\$500
PS	\$2,500	\$900	\$225	\$225	\$275	\$275	\$300	\$300
Enlistment	\$5,000	\$2,000	\$500	\$500	\$500	\$500	\$500	\$500
	\$2,500	\$900	\$225	\$225	\$275	\$275	\$300	\$300
Reenlistment	\$5,000	\$2,000	\$500	\$500	\$500	\$500	\$500	\$500
Health Professional	\$30,000	\$10,000	\$10,000	\$10,000				

*NPS Initial Payment is made upon completion of IADT. No payment is then made until completion of the 2nd year, as indicated above.

3.5. Enlisted Student Loan Repayment Program (SLRP):

3.5.1. The SLRP may be elected by a member who enlists (PS or NPS) or reenlists for 6 years and completes an NGB Form 36-5, Enlisted Student Loan Repayment Program Written Agreement. A qualified member may elect either a cash bonus or SLRP participation, unless qualified for both IAW paragraph 3.2.3. Members may not sign a written agreement for the SLR program upon attaining 20 years of service based upon pay date. Participants must:

3.5.1.1. Have, or may have, one or more loans made, insured, or guaranteed after 1 Oct 75 under Part B or E of the Higher Education Act of 1965. Parents Loans for Undergraduate Students (PLUS) loans are not eligible for repayment under this program, however, members who were in the SLRP program prior to 1 Oct 94 and who incurred a PLUS loan prior to that date, may continue in repayment status for the term of the agreement.

3.5.1.2. Enlist or reenlist in a valid vacancy of an AFSC identified as incentive eligible on the date of enlistment or reenlistment. Members must agree to serve the entire enlistment or reenlistment in an incentive eligible AFSC unless excused for the convenience of the government. Eligibility must be reestablished and a new written agreement accomplished upon each enlistment or reenlistment.

3.5.1.3. Be classified as Mental Category I (93-99); Category II (65-92); or Category III (31-64).

3.5.1.4. Be a secondary school graduate as defined in attachment 1, and have completed IADT.

3.5.1.5. Not be enlisting or reenlisting to qualify for a full-time position where federal law requires membership in the ANG as a condition of employment. Persons selected for a temporary position may be eligible.

3.5.2. Processing eligibility for SLR participation. Each SLRP participant claiming one or more qualifying student loans will assist the ROM in completing a DD Form 2475 to be forwarded to the loan holder for verification of the loans. Each loan must be verified on the DD Form 2475 by the lending institution holding the loan. Upon verification, the ROM will process authorization for repayment according to established procedures.

3.5.3. Student loan repayment (SLR) amount and payment schedule:

3.5.3.1. The total amount that may be repaid towards the principle on behalf of any member under this program will not exceed \$1,500 annually, to a maximum of \$10,000 (or \$20,000 for members enrolled in the SLRP before 1 Oct 88), plus any accrued interest.

3.5.3.2. When funds are available, repayment will not be more than the current loan balance. The portion or amount of the loan to be repaid annually on a member's qualifying loans is 15 percent of the outstanding balance (not original balance) of the loan (or loans totaled together), or \$500 per member, whichever is greater, PLUS annual accrued interest, for each year of satisfactory service completed.

3.5.3.3. Initial payment will not be made until satisfactory completion of IADT; however, this date does not affect future anniversary payments. Each completed year of satisfactory service in the ANG performed under this agreement establishes an anniversary date. Payment will be processed on or after each anniversary date for each year of satisfactory service completed. Payment for a fractional part of a year is unauthorized except as described in paragraph 3.5.4.

3.5.3.4. Repayment will be made only upon verification of the loan's currency after each 12 months of satisfactory service performed in the ANG, and will be made directly to the lending institutions holding the loans. The member is responsible for annual payments missed due to lack of verification.

3.5.3.5. Repayment may be subject to suspension, based upon authorized non-availability (i.e., temporary overseas residence, missionary obligation or overseas employment obligation, etc.). Members being processed for unsatisfactory participation, may have their incentive payments suspended until final determination of unsatisfactory participation is made. If an anniversary payment is scheduled while a loan is in suspension, the lender will give the outstanding balance and loan status when suspension is terminated. Subsequent repayments will be processed on scheduled anniversaries.

3.5.3.6. Recoupment will not be required because repayments are applied at yearly anniversaries and then only upon verification. In the case of an erroneous verification, the total amount paid for the year will be collected from the member under procedures specified for recoupment of unearned benefits.

3.5.3.7. Student loan payments will not be made on loans that are identified as "in default" by the lender unless the lender restores the qualifying loan's currency and withdraws the declaration of default. Responsibility to negotiate restoration of the loan's currency rests with the member. Waivers to make anniversary payments on defaulted student loans may be considered by MPPAR if well justified.

3.5.3.8. It will be the responsibility of the member to notify the ROM of loans obtained. As a minimum, members should coordinate with the ROM at least 60 days before the anniversary date to ensure verification action is initiated to the loan holder.

3.5.3.9. No payment will be made by the ANG to refund amounts paid by the member or any other agency. The ANG SLRP is intended only to assist in the repayment of eligible student loans. No promise will be made to the enlistment or reenlistment candidate to indicate the ANG will "repay the loan" in its entirety for the member.

3.5.3.10. Payments made to lending institutions on behalf of ANG members are taxable, and will be included as income on the member's military W-2 form. Members should consult a tax advisor to determine if any of their educational expenses are tax deductible.

3.5.4. Payments for a Fractional Year. In the event a member transfers from the ANG to an active duty component, he or she will be eligible for payment by fractional credit for that portion of the anniversary year served in the ANG. The repayment will be prorated based on the time (in whole months) served in the ANG.

3.5.5. Out-of-Year Student Loan Payment Guidance:

3.5.5.1. If student loan payments will be made outside the Fiscal Year, ROMs, in coordination with the members must estimate the total payment amount, and notify each unit accounting function of these possible outstanding payments.

3.5.5.2. Each unit accounting function faced with the out-of-year payment situation, must complete an AF Form 406, Miscellaneous Obligation Reimbursement Document (MORD) (IAW DFAS-DE 177-102, Commercial Transactions at Base Level), prior to fiscal year end using the estimate furnished by the ROM. This allows the accounting office to obligate the funds prior to the fiscal year end without having the lending institution's confirmation. Later in the next fiscal year the payment can be made using the prior fiscal year's funds.

3.6. Termination of Enlisted Incentive Program Participation. Entitlement to continued enlisted incentive program participation will be terminated under any of the following conditions:

3.6.1. Failure to meet high school graduation requirements before departure for BMT/TTS (NPS enlistees only).

3.6.2. Failure to participate satisfactorily in required training.

3.6.2.1. Members being processed for unsatisfactory participation, may have their incentive payments suspended until final determination of unsatisfactory participation is made.

3.6.2.1.1. Members are not to be terminated from the incentive program on the basis of disciplinary or punitive action, or performance issues. If there is reason to believe that separation or discharge is imminent, payments will be delayed until official notification of separation or discharge. (The purpose of the incentive program is to fill critical skills. Higher standards will not be applied to members participating in the incentive program.)

3.6.2.1.2. The effective date of termination for unsatisfactory participation will be provided to the ROM by the member's commander. This will be the date of the commander's first letter notifying the member of the unsatisfactory participation status. The ROM should coordinate with the MPF to obtain a copy of this letter.

3.6.2.2. A record copy of the termination decision will be maintained in the case file by the ROM.

3.6.3. Acceptance of a full-time position where membership in the ANG is a condition of employment (this provision does not apply to temporary technician or full-time active duty assignments of less than 180 days, or members performing duty for the purpose of interdiction and counter-drug activities for which funds have been provided under section 112 of title 32).

3.6.4. Separation from the ANG as an enlisted person for any reason, including death, enlistment or voluntary recall into the active forces, or appointment as an officer.

3.6.5. Becomes excess to the incentive eligible UMD position except as a result of an NGB directed reorganization (excess status code G). Continuation in the program, under other than excess status code G, must receive prior approval in writing by ANG/MPPAR.

3.6.5.1. Submit waiver requests with justification, through channels, to ANG/MPPAR for staffing and approval. Waiver requests submitted after the fact will not be favorably considered. After a thorough review, ANG/MPPAR will provide a written response to the requesting office.

3.6.5.2. Every effort must be made to remove the member from excess status according to ANGI 36-2101, Assignments Within the Air National Guard.

3.6.6. Voluntarily transfers to a non-incentive eligible UMD position, including transfers where a member cross-trains into a non-incentive eligible UMD position at another ANG unit.

3.6.7. Transfers from the AFSC for which enlisted with an affiliation bonus.

3.7. Exclusion From Termination. An airman whose service is satisfactory may continue to receive incentive payments under any of the following conditions:

3.7.1. Transfers to a different ANG unit and continues to serve in the original incentive AFSC, regardless of whether it is on the gaining unit's incentive eligible AFSC list.

3.7.2. Transfers to another ANG unit and retrains into a valid vacancy of an AFSC on the gaining unit's current incentive AFSC list. The member will remain in the same incentive payment category as determined by the original incentive written agreement.

3.7.3. Is excess to the incentive UMD AFSC position or AFSC is withdrawn, due to NGB-directed reorganization or conversion.

3.7.4. Is excess to the incentive UMD AFSC position due to other than an NGB-directed reorganization, and the ROM has written waiver approval for continued participation on file.

3.7.5. Incurs a period of authorized nonavailability (temporary overseas residence, missionary obligation, or overseas employment, etc.) and is assigned temporarily to the Stand-by Reserve. The member will be required to extend the term of enlistment for the projected period of nonavailability. During the period of nonavailability, the member will not be entitled to incentive payments. Entitlement to payments will resume on the adjusted anniversary date following reaffiliation with the ANG. The period of nonavailability will not exceed 3 years.

3.8. Recoupment of Unearned Incentive Payments. Recoupment of unearned incentive payments will not affect the member's period of contracted service. Recoupment will be made if the member:

3.8.1. Fails to participate satisfactorily during the term of enlistment.

3.8.2. Accepts a full-time position (other than temporary) and has served less than 6 months following receipt of the initial incentive payment.

3.8.3. Separates from the ANG as an enlisted person for any reason (including enlistment or voluntary recall into an active component), other than death, or is disqualified for world-wide duty as a result of the member's own misconduct.

3.8.4. Accepts an appointment as an officer in the ANG and has served less than 1 year following receipt of the initial incentive payment.

3.8.5. Retrains to a non-incentive qualified AFSC, except as a result of an NGB-directed reorganization, and the ROM does not have a written waiver approval for continued participation on file.

3.8.6. Transfers from the AFSC for which enlisted with an affiliation bonus.

3.9. Incentive Program Administration:

3.9.1. Eligibility Determination. The recruiting office will forward an Incentive Program Eligibility Verification Worksheet (attachment 3) on each potentially incentive eligible member to the ROM. Selection by the member's immediate commander for reenlistment may equate to approval for incentive consideration. The ROM will verify eligibility and, if eligible, prepare the appropriate incentive written agreement upon enlistment, reenlistment or appointment.

3.9.2. Following enlistment, reenlistment or appointment, the ROM will:

3.9.2.1. Review the written agreement with the member and explain the member's obligation; identify causes for termination; specify procedures for recoupment of payments; and brief the member on payment dates and amounts.

3.9.2.2. Provide copies of the agreement to the member.

3.9.2.3. Assign a bonus control number. The ROM will assign a bonus control number (BCN) (see attachment 8 for BCN definitions), to each bonus case file. After verifying the member's Personnel Data System (PDS) record is

3.9.2.3. (Cont) fully loaded (record status will be "110"), the ROM will use PTI 47I or 47J, as appropriate, to update the member's record. Unsuccessful efforts to update the PDS record may be referred to ANG/MPPAR for assistance.

3.9.2.4. Construct a case file for each member entering any of the ANG incentive programs. The case file will, as a minimum, contain the following:

3.9.2.4.1. NGB Form 38-5, Incentive Bonus Case File Cover Sheet. A computer-generated NGB Form 38-5, Incentive Bonus Case File Cover Sheet may be used.

3.9.2.4.2. NGB Form 38-4, Incentive Payment Authorization. Use NGB Form 38-4 containing comptroller payment request verification for authorizing all incentive payments.

3.9.2.4.3. Directions for preparing NGB Form 38-4 and 38-5 are self-explanatory. These forms are not subject to the Privacy Act.

3.9.2.4.4. The original signed and dated written agreement.

3.9.2.4.5. A copy of the appropriate FY log letter and unit's Category I or Category II AFSC listing that the member's agreement falls under.

3.9.2.4.6. A copy of the DD Form 4 and copies of any additional source documents related to the member's incentive participation.

3.9.2.4.7. Any AF Form 2096 designating duty status (AFSC).

3.9.2.4.8. Proof of payment/payment voucher.

3.9.3. Initial Payments:

3.9.3.1. Initial payment (1st installment) for the NPS Enlistment Bonus is authorized only after the member is awarded the 3-skill level as appropriate, and has completed IADT.

3.9.3.2. Initial payment (1st installment) for the Affiliation Bonus, Prior Service Enlistment Bonus, Reenlistment Bonus, or the Health Professional Cash Bonus, is authorized when the enlistment, reenlistment or appointment contract is completed and the member starts attending UTAs.

3.9.3.2.1. Not less than 60 days prior to any anniversary date, the ROM will forward an NGB Form 38-4, or a suitable computer-generated NGB Form 38-4, to the member's immediate commander for authorization to pay the installment. No later than 30 days before the payment date, the commander will approve or deny payment and return the annotated form to the ROM. If approved, the ROM will forward the form to the base finance office for payment.

3.9.3.2.2. Following verification that a payment was made, the ROM will annotate the member's case file cover sheet, update the automated Incentive Program file, and file the annotated NGB Form 38-4 in the member's incentive case file.

3.9.3.2.3. If the commander denies payment, a termination effective date and cause for termination will be provided by the commander. The ROM will initiate termination and any recoupment action required. Members being processed for unsatisfactory participation or cause, will have their incentive payments suspended until final determination of unsatisfactory participation is made.

3.9.3.2.4. In the event the installment payment is rejected by Defense Finance and Accounting Service-Denver Center (DFAS-DE), the ROM will determine the exact cause of the reject, make necessary PDS corrections, and, within 30 working days, ask the finance office to re-input the payment request. The member should be notified of the reject and delay in payment.

3.9.3.3. Student Loan Repayment Program Payment Procedures. As a minimum, 60 days before the SLR payment due date, the member will complete a DOD Educational Loan Repayment Program (LRP) Annual Application, (DD Form 2475). The DD Form 2475 will be sent to the loan holding institution to be completed, signed and dated by a lending institution official, and returned to the ROM.

3.9.3.4.1. The ROM will forward an NGB Form 38-4 to the member's immediate commander for approval. If approved, and upon receipt of loan verification, the ROM will send the NGB Form 38-4 and provide the name and address of the lending institution (for each loan), to the finance office.

3.9.3.4.2. If the payment is denied by the commander, the ROM will initiate termination action. Because Student Loan Repayment Program payments are made after the service is performed, no recoupment of student loan payments is necessary.

3.10. Disposition of Incentive Records:

3.10.1. When it has been determined that an incentive participant has transferred to a new ANG unit, the member's incentive case file will be forwarded to the ROM of the gaining MPF. The gaining ROM will verify continued incentive eligibility or participation. The ROMs involved will coordinate loss and gain entries on the bonus status report for the same month.

3.10.2. The ROM in the gaining MPF will initiate termination action if the member voluntarily transfers to a non-incentive eligible AFSC at the gaining unit, unless remaining in the original AFSC for which enlisted with an incentive.

3.10.3. When a member is terminated from the incentive program for any reason other than transfer to another ANG unit, the member's case file will be retained by the ROM for 3 years after termination date.

3.11. ANG Incentive Program Status Report. This report is used to ensure the Defense Finance and Accounting Service-Denver Center (DFAS-DE) has sufficient funds to cover incentive payment requests submitted by local ANG finance offices. It also provides information used to monitor use of incentive funds, prepare for possible reallocations, and plan for future budgetary requests. It will contain all incentive payments earmarked and paid for the current fiscal year and payments earmarked for the next fiscal year. Format for this report, which must be computerized, will be provided by ANG/MPPAR.

3.11.1. Instructions for completing the Initial Payment section:

3.11.1.1. **COLUMN A.** Enter the funding ceiling programmed for your State or unit for initial payment opposite the program to which it applies. This amount will not be changed unless an adjustment is approved by the programming authority (ANG/MPPAR for States and State headquarters for base-level units.) State funding ceilings defined by ANG/MPPAR will not be exceeded without prior approval.

3.11.1.2. **COLUMN B.** For each line item, enter the number of people who have been issued a control number for this FY in the NUMBER column. Multiply the line item rate by the number people and enter that amount in the AMOUNT column.

3.11.1.2.1. For affiliation bonuses, the amount of money will vary depending on the number of months remaining on the member's MSO.

3.11.1.2.2. For Enlisted Student Loan Repayment Program data, show the number of participants having one or more loans who will be eligible for a first payment on the first anniversary of enlistment or reenlistment during this FY. The amount will be 15 percent of the outstanding balance of the loans, or \$500 per member, whichever is greater. The total amount that may be repaid towards the principle on behalf of any member under this program will not exceed \$1,500 annually, to a maximum of \$10,000 (or \$20,000 for members enrolled in the SLRP before 1 Oct 88).

3.11.1.2.3. For Health Professional Student Loan Repayment Program data, show the number of participants having one or more loans who will be eligible for a first payment on the first anniversary of appointment during this FY. The amount will be \$3,000 per member, per year, or the outstanding balance of the loan, whichever is less. The total amount that may be repaid on behalf of any member under this program is \$20,000.

3.11.1.2.4. The number of people shown for initial payments will not decrease unless a member's participation in the incentive program is canceled or the member is transferred prior to a payment being made. If a payment has already been made, the member will be counted during that FY.

3.11.1.3. **COLUMN C.** This column must reflect only the number and amount for which payment requests have been submitted to the finance office. Enter data for each incentive line item as appropriate.

3.11.1.4. **COLUMN D.** This column follows the same procedures outlined for COLUMN B, and reflects projected initial payments in the next FY.

3.11.1.5. Enter total number and amounts at the bottom of each column.

3.11.2. Instructions for completing the anniversary payment section:

3.11.2.1. **COLUMN A.** No entry is required, as anniversary payments have been programmed at ANG/MPPAR for all current incentive participants.

3.11.2.2. **COLUMN B.** This column is for anniversary payments due this fiscal year. These figures will remain the same on every report during the FY unless individuals are terminated or transfer prior to submission for payment. In the event of transfer, the gaining ROM and losing ROM must coordinate the month in which one will drop the member and the other will pick the member up. Computation of money for each category will follow the same procedures as outlined for initial payments.

3.11.2.2.1. The anniversary payment for the Affiliation Bonus is made in the fiscal year in which the sixth anniversary of the MSO occurs. In some cases this will be the same FY in which the initial payment was made. In other cases, the anniversary payment will not be due until the second or subsequent year following the initial payment.

3.11.2.2.2. Enlisted Student Loan Repayment Program anniversary payments show the number of participants having one or more loans who will be eligible for an installment on the second or subsequent anniversary of enlistment this FY. The amount will be 15 percent of the outstanding balance of all of the loans or \$500 per member, whichever is greater but will not be more than the current loan balance. The total amount that may be repaid on all loans will not exceed \$10,000 on behalf of any member.

3.11.2.2.3. Health Professional Student Loan Repayment Program anniversary payments show the number of participants having one or more loans who will be eligible for an installment on the second or subsequent anniversary of appointment this FY. The amount will be \$3,000 per member, or the outstanding balance of the loan, whichever is less. The total amount that may be repaid on all loans will not exceed \$20,000 on behalf of any member.

3.11.2.3. **COLUMN C.** Procedures for entries in this column follow those outlined for initial payments.

3.11.2.4. **COLUMN D.** Enter the numbers and amounts for each category, which reflect those participants due an anniversary payment in the next FY. These numbers will not change unless individuals are terminated or transfer.

3.11.2.5. Enter the totals for each column at the bottom of the page.

3.11.3. The ROM will prepare a bonus status report as of the last workday of each month. The Recruiting and Retention Superintendent (RRS) will ensure a copy of the bonus status report is sent from each ROM to ANG/MPPAR no later than the 10th of the month following the end of the month being reported. The ROM will send an information copy of the report to the DP and RRS.

3.11.4. ANG/MPPAR will verify and consolidate all bonus status reports for use in monitoring utilization of the incentive budget and projecting funding needs.

Chapter 4

ANG OFFICER INCENTIVE PROGRAMS

4.1. Health Professions Incentive Programs. All qualifying medical officers appointed or commissioned in identified critical AFSCs may be eligible for participation in the Health Professionals Student Loan Repayment Program, the Healthcare Professional Cash Bonus, or the Ready Reserve Healthcare Professionals' Stipend Program. Certain students (both enlisted and officer) may be eligible for the Baccalaureate Stipend Program. Qualifying AFSCs are published yearly by ANG/MPPAR. Members in the Health Professional Cash Bonus Program may NOT participate in more than one program at a time. NOTE: Qualified physicians are eligible for these incentives until physician manning is in excess of 150 percent nationwide.

4.2. Health Professionals Student Loan Repayment Program:

4.2.1. Eligibility. Health professionals who meet the following requirements and execute an NGB Form 36-2, Health Professionals Loan Repayment Program Written Agreement, may participate. Members must be:

4.2.1.1. Commissioned or appointed in the ANG after 30 September 1985.

4.2.1.2. Board certified (licensed), where required.

4.2.1.3. Appointed to serve in an ANG Health Professions incentive eligible medical skill determined as wartime critical by the Assistant Secretary of Defense (Health Affairs). These incentive eligible AFSCs are published annually by ANG/MPPAR.

4.2.1.4. Appointed to a billet that requires the specialty for which the member will receive incentive benefits.

4.2.1.5. Has, or may have, one or more student loans made, insured, or guaranteed after 1 October 1975 under Parts B and E of the Higher Education Act of 1965, and health education assistance loans obtained, made, insured or guaranteed under Part C of the Public Health Services Act. Each loan must be verified on DD Form 2475 as described for the enlisted SLRP in paragraph 3.5.2.

4.2.2. Health Professionals Student Loan Repayment Program amount and payment schedule:

4.2.2.1. The total amount that may be repaid on the part of any participant in this program will not exceed \$20,000 over the lifetime of the member. Loans that are less than 1 year of age do not qualify for payment under this program.

4.2.2.2. When funds are available, the amount of the qualifying loans that may be repaid, when totaled together, may not exceed \$3,000 annually per member for each year of satisfactory service performed as a commissioned officer in the ANG, nor more than the outstanding balance of the loan. Interest payments are not authorized for this program.

4.2.2.3. Each completed year of satisfactory service in the ANG performed under this agreement establishes an anniversary date. Payments shall be made to the lending institution on or after each anniversary date for each year of satisfactory service completed, beginning with the first anniversary date following the signed agreement to participate in that program. Loans must be at least 1 year old on the anniversary date to qualify for repayment under this program. Payment for a fractional part of a year is unauthorized except as described in paragraph 4.2.3.

4.2.2.4. Repayment will be made only upon verification of the loan's currency after each 12 months of satisfactory service performed as a commissioned officer in the ANG, and will be made directly to the lending institutions holding the loans. The member is responsible for annual payments missed due to lack of verification.

4.2.2.5. Repayment may be subject to suspension, based upon authorized non-availability of the member to serve in the Selected Reserve. If an anniversary payment is scheduled while a loan is in suspension, the lender will give the outstanding balance and loan status when suspension is terminated. Subsequent repayments will be processed on scheduled anniversaries.

4.2.2.6. Recoupment will not be required because repayments are applied at yearly anniversaries and then only upon certification. In the case of an erroneous certification, the total credit paid for the year will be collected from the member under procedures specified for recoupment of unearned benefits.

4.2.2.7. Student loan payments will not be made on loans that are identified as "in default" by the lender unless the lender restores the qualifying loan's currency and withdraws the declaration of default. Responsibility to negotiate restoration of the loan's currency rests with the member. Waivers to make anniversary payments on defaulted student loans may be considered by MPPAR if well justified.

4.2.2.8. It will be the responsibility of the member to notify the ROM of loans that have been obtained. Members should coordinate with the ROM at least 60 days before the anniversary date to ensure loan verification is initiated to the loan holder.

4.2.2.9. No payment will be made by the ANG to refund amounts paid by the member or any other agency. The Health Professionals SLRP is intended only to assist in the repayment of eligible student loans. No promise will be made to the member to indicate the ANG will “repay the loan” in its entirety for the member.

4.2.2.10. Payments made to lending institutions on behalf of ANG members are taxable, and will be included as income on the member’s military W-2 form. Members should consult a tax advisor to determine if any of their educational expenses are tax deductible.

4.2.3. Payments for a Fractional Year. In the event a member transfers from the ANG to an active duty component, he or she will be eligible for repayment by fractional credit for that portion of the anniversary year served in the ANG. The payment will be prorated based on the time (in whole months) served in the ANG.

4.2.4. Out-of-Year Student Loan Payment Guidance:

4.2.4.1. If student loan payments will be made outside the fiscal year, ROMs, in coordination with the student must estimate the total payment amount, and notify each unit accounting function of these possible outstanding payments.

4.2.4.2. Each unit accounting function faced with the out-of-year payment situation, must complete an AF Form 406, IAW DFAS-DER 177-102, prior to fiscal year end using the estimate furnished by the ROM. This allows the accounting office to obligate the funds prior to the fiscal year end without having the lending institution’s confirmation. Later in the next fiscal year the payment can be made using the prior fiscal year’s funds.

4.3. Healthcare Professional Cash Bonus:

4.3.1. Eligibility. Health professionals who meet the following requirements and execute an NGB Form 36-3, Cash Bonus for Selected Healthcare Professionals Written Agreement, may participate. Members must:

4.3.1.1. Be entering into the armed forces of the United States for the first time; or have been honorably discharged before 28 Apr 89 and now entering the armed forces of the United States for the first time since.

4.3.1.2. Be appointed to serve in an ANG Health Professions incentive eligible medical skill determined as wartime critical by the Assistant Secretary of Defense (Health Affairs). These incentive eligible AFSCs are published annually by ANG/MPPAR.

4.3.1.3. Be licensed in the specialty he/she is being recruited into. Individuals in a residency program do not qualify for a cash bonus under this incentive program.

4.3.1.4. Not have ever received this bonus in the past.

4.3.2. The Health Professional cash bonus will pay \$10,000 per year (minus applicable taxes) for 3 years, and is payable as follows (See table 3-1, Cash Bonus Payment Schedule):

4.3.2.1. An initial amount not to exceed \$10,000.

4.3.2.2. Subsequent payments of \$10,000 each due on the first and second anniversary.

4.3.2.3. Program participants must remain in the billet to which the incentive applies in order to receive annual installment payments. (Members who are involuntarily transferred to the Individual Ready Reserve as a result of force structure changes or force reduction actions may be eligible to continue to receive the benefits identified under their initial contract).

4.3.2.4. Units wishing to offer this cash bonus must request prior approval for funding on a case-by-case basis from ANG/MPPAO, and must report expenditures on their Incentive Program Status Report monthly.

4.4. The Ready Reserve Healthcare Professions Stipend Program. Certain health professionals, to include registered nurses, and undergraduate nursing students in their third or fourth year of a Baccalaureate Degree program, may be eligible for a monthly stipend for the duration of the residency or special program enrolled (the rate of which is adjusted annually on 1 July). This program is intended to provide financial aid to ANG members in programs and residencies for specialties critically needed by the Air Force. Wartime critical specialties qualifying for the stipend program are established annually by the Assistant Secretary of Defense (Health Affairs), and are published annually by ANG/MPPAR.

4.4.1. Stipend Program for Ready Reserve Healthcare Professions (Physicians):

4.4.1.1. Eligibility. To qualify for the physician stipend, the member must execute an NGB Form 36-4, Stipend Program for Ready Reserve Physicians Written Agreement, and be:

4.4.1.1.1. A graduate of a medical school, and possess a current, valid, and unrestricted license to practice medicine, and such additional health professional privileges as are required to pursue professional training in the critical specialty for which assistance is being provided.

4.4.1.1.2. Eligible for appointment as a medical officer in the ANG (in a physician billet, although not necessarily the specialty billet).

4.4.1.1.3. Enrolled, or been accepted for enrollment in a residency program for physicians in a critical wartime medical specialty.

- 4.4.1.2. Upon completion of residency, program, or degree, every effort should be made by the unit to place the member in the appropriate specialty that qualified the member for the stipend.
- 4.4.1.3. Physicians will incur an extended reserve service obligation of 2 years for each year or partial year for which stipend assistance is provided.
- 4.4.1.4. Repayment of the obligation shall begin on completion of member's residency training program, unless excused under "convenience of Government" criteria, and may be postponed only to allow for consecutive participation in the Health Professionals Student Loan Repayment Program, if qualified.
- 4.4.2. Stipend Program for Ready Reserve Healthcare Professions (Reserve Service Registered Nurses).
- 4.4.2.1. Eligibility. To qualify for the nurse stipend, the member must execute an NGB Form 36-1, Stipend Program for Ready Reserve Registered Nurses Written Agreement, and be:
- 4.4.2.1.1. A registered nurse, and possess a current, valid and unrestricted nursing license and such additional nursing or clinical privileges as are required to pursue professional training in the critical specialty for which assistance is being provided.
- 4.4.2.1.2. Eligible for appointment, designation or assignment as a nurse in the ANG.
- 4.4.2.1.3. Performing satisfactory service as a commissioned officer in the ANG (if already commissioned).
- 4.4.2.1.4. Enrolled, or been accepted for enrollment in an accredited nursing program in a critical wartime medical specialty.
- 4.4.2.2. Upon completion of residency, program, or degree, every effort should be made by the unit to place the member in the appropriate specialty that qualified the member for the stipend.
- 4.4.2.3. Nurses will incur an extended reserve service obligation of 2 years for each year or partial year for which stipend assistance is provided.
- 4.4.2.4. Repayment of the obligation shall begin on completion of member's nursing specialty training program, unless excused under "convenience of Government" criteria, and may be postponed only to allow for consecutive participation in the Health Professionals Student Loan Repayment Program, if qualified.
- 4.4.3. Stipend Program for Ready Reserve Healthcare Professions (Reserve Service Baccalaureate Students):
- 4.4.3.1. Eligibility. To qualify for the stipend for baccalaureate students, the member must execute an NGB Form 36, Stipend Program for Ready Reserve Baccalaureate Students Written Agreement, and be:
- 4.4.3.1.1. Enrolled, or accepted for enrollment, as a third or fourth year student in an accredited baccalaureate program leading to a degree in a critical health professions specialty.
- 4.4.3.1.2. Eligible for appointment, designation, or assignment as a reserve officer, for duty in the ANG upon completion of the baccalaureate program.
- 4.4.3.2. Upon completion of residency, program, or degree, every effort should be made by the unit to place the member in the appropriate specialty that qualified the member for the stipend.
- 4.4.3.3. Members will incur a selected reserve service obligation of 1 year for each year or partial year for which stipend assistance is provided.
- 4.4.3.4. Repayment of the obligation shall begin on completion of member's baccalaureate degree program, and shall be in the ANG with duty in a critical healthcare profession, unless excused under "convenience of Government" criteria, and may be postponed only to allow for consecutive participation in the Health Professionals Student Loan Repayment Program, if qualified.

4.5. Termination and Recoupment of Health Professional Incentive Program Eligibility. Entitlement to continued Health Professional Incentive Program Eligibility will be terminated under any of the following conditions:

- 4.5.1. Transfer to an ineligible military specialty or ineligible health professions specialty, without the express direction of ANG/MPPAR.
- 4.5.2. Separation from the ANG for any reason (including appointment or voluntary order to AD in the active forces), other than by death, injury, illness or other impairment not the result of member's own misconduct.
- 4.5.3. Acceptance of an AGR or military technician position where membership in the ANG is a condition of employment (this provision does not apply to temporary technician or full-time active duty assignments of less than 180 days, or members performing duty for the purpose of interdiction and counter-drug activities for which funds have been provided under section 112 of title 32).
- 4.5.4. Failure to participate satisfactorily in required training with the ANG, in accordance with ANG regulations, unless the failure to participate satisfactorily was due to reasons beyond the member's control (i.e., death, injury, illness, or other impairment).
- 4.5.5. Failure to extend the contracted term of service for a period of authorized nonavailability.

4.5.6. Failure to maintain a current or unrestricted valid medical or nursing license, as required, and such additional medical certification and privileges as may be required to practice as a health professional in the critical specialty for which Health Professional Incentive Program participation is authorized.

4.5.7. Completes the baccalaureate degree or contracted period of training, or receives medical certification and privileges as may be required to practice as a health professional in the critical specialty for which the stipend is authorized.

4.5.8. Is dropped from the Stipend Program for deficiency in specialty training or voluntarily stops training in the critical specialty designated for the Stipend Program.

4.5.9. If the member fails to complete for any reason, the residency training program or baccalaureate degree program for which stipend assistance is provided, or fails to complete an incurred obligation, he/she may be required to either:

4.5.9.1. Perform 1 year of active duty for each year (or part thereof) for which stipend assistance was provided, or

4.5.9.2. Repay the government an amount equal to the total amount paid to the member under the Stipend Program.

4.5.10. Recoupment of Unearned Healthcare Professional Cash Bonus Payments. Recoupment of unearned incentive payments will not affect the member's period of contracted service. Recoupment will be made if the member is terminated from the Healthcare Professional Cash Bonus Program for any of the above reasons, during the contracted term of service only. Recoupment will equal the total amount of the current year's payment (or anniversary payment).

4.6. Health Professional Incentive Program Administration:

4.6.1. Eligibility Determination. The recruiting office will forward an Incentive Program Eligibility Verification Worksheet (attachment 3) on each potentially incentive eligible member to the ROM. The ROM will verify eligibility and, if eligible, prepare the appropriate incentive written agreement upon enlistment, reenlistment or appointment.

4.6.2. Following appointment, the ROM will:

4.6.2.1. Review the written agreement with the member and explain the member's obligation; identify causes for termination; specify procedures for recoupment of payments; and brief the member on payment dates and amounts.

4.6.2.2. For all ANG Stipend programs, ROMs will provide the applicant with an AF Form 3046, The Air Force Ready Reserve Stipend Program (AFRRSP) Certificate of Enrollment. The ROM will complete section I of the AF Form 3046. The applicant will take the AF Form 3046 to his/her school, and will have the director of his/her professional training program complete section II and notarize the form. The applicant will return the form to the ROM, who will review and confirm qualification for the stipend program. The ROM will then explain the appropriate stipend written agreement (NGB Form 36, 36-1 or 36-4), to the member, and have the member complete the agreement. Upon completion, the ROM will forward a copy of the Stipend Program Written Agreement, Stipend Program Application Worksheet (attachment 9), and completed AF Form 3046 to HQ ANG/MPPAR, via certified mail/return receipt requested. The ROM should follow-up with ARPC after 10 workdays to confirm status of application. The ROM must also review the applicant file annually to confirm continued qualification of applicant (or when notified by applicant of any change in status).

4.6.2.3. Provide copies of all forms to the member.

4.6.2.4. Construct a case file for each member entering any of the ANG officer incentive programs. The case file will, as a minimum, contain the following:

4.6.2.4.1. NGB Form 38-5, Incentive Bonus Case File Cover Sheet. A computer generated form may be used.

4.6.2.4.2. NGB Form 38-4, Incentive Payment Authorization. Use NGB Form 38-4 containing comptroller payment request verification for authorizing all incentive payments. For stipend program participants, no verification of payment is required.

4.6.2.4.3. Directions for preparing NGB Form 38-4 and 38-5 are self-explanatory. These forms are not subject to the Privacy Act.

4.6.2.4.4. The original signed and dated written agreement.

4.6.2.4.5. AF Form 3046 and Stipend Program Application Worksheet.

4.6.2.4.6. A copy of the appropriate FY log letter that the member's agreement falls under.

4.6.2.4.7. Copies of any additional source documents related to the member's incentive participation.

4.7. Disposition of Health Professional Incentive Program Records:

4.7.1. When it has been determined that an incentive participant has transferred to a new ANG unit, the member's incentive case file will be forwarded to the ROM of the gaining MPF. The gaining ROM will verify continued

- 4.7.1. (Cont) incentive eligibility or participation. The ROMs involved will coordinate loss and gain entries on the bonus status report for the same month.
- 4.7.2. The ROM in the gaining MPF will initiate termination action if the member voluntarily transfers to a non-incentive eligible AFSC at the gaining unit, unless remaining in the same AFSC that originally qualified the member for the incentive.
- 4.7.3. When a member is terminated from the incentive program for any reason other than transfer to another ANG unit, the member's case file will be retained by the ROM for 3 years after termination date.

4.8. Health Professional Incentive Program Reporting. The Health Professional Incentive Program will be reported in the ANG Incentive Program Status Report IAW paragraph 3.11

Chapter 5

MONTGOMERY GI BILL (MGIB) EDUCATIONAL ASSISTANCE PROGRAM

5.1. Montgomery GI Bill - Selected Reserve (MGIB-SR):

- 5.1.1. In accordance with 10 USC Chapter 1606, the MGIB-SR, (formerly Chapter 106, and hereafter referred to as MGIB-SR), shall be used to encourage and sustain membership in the Air National Guard. Publicity campaigns should be conducted to ensure wide dissemination of information on the availability of the MGIB-SR.
- 5.1.2. MGIB-SR Entitlement. Members of the Selected Reserve who meet the following criteria, continue to participate satisfactorily, and have been issued a DD Form 2384, or after 31 Dec 91 a DD Form 2384-1, Notice of Basic Eligibility (NOBE), are entitled to, educational assistance.
- 5.1.2.1. Individuals must, on or after 1 Jul 85, enlist, reenlist or extend an enlistment in a reserve component for service in the Selected Reserve for a period of not less than 6 years or, in the case of officers, agree to serve in the Selected Reserve for 6 years beyond any existing Selected Reserve service obligation.
- 5.1.2.2. Individuals must complete initial active duty training (IADT).
- 5.1.2.3. Individuals must complete the requirements for award of a high school diploma or equivalency certificate before completing IADT or, in the case of an individual reenlisting or extending an enlistment, complete this educational requirement before such reenlistment or extension.
- 5.1.2.4. Individuals must not be receiving financial (scholarship) assistance as a member of the Senior Reserve Officer Training Corps (ROTC) program.
- 5.1.2.5. Individuals must remain a drilling member of the Selected Reserve to maintain eligibility for MGIB-SR benefits. Member's entitlement is forfeited when he or she ceases to participate in the Selected Reserve. (See paragraph 5.2.5., Continuation of Benefits, for exceptions.)
- 5.1.3. Educational assistance may be provided for the pursuit of any program of education that is approved by the Department of Veterans Affairs (DVA).
- 5.1.3.1. To be eligible for educational assistance under the expanded benefits program (e.g., multiple baccalaureate degrees, flight training, vocational/technical training), enlistment, reenlistment, extension, or agreement to serve must be initiated on or after 1 Oct 90. Educational assistance for programs of instruction beyond the baccalaureate level were authorized in Public Law on 30 Nov 93.
- 5.1.3.2. All MGIB-SR benefits are paid directly to the member while in an active selected reserve status, and cease upon separation. (See paragraph 5.2.5., Continuation of Benefits, for exceptions.) Benefits are paid for a maximum of 36 months based upon full-time pursuit or the equivalent for less than full time. Benefits are paid for full, three-quarter, or half-time, and at an appropriately reduced rate, as determined by the Secretary, DVA, for each month of less than half-time. No payment will be made to a person for less than half-time if tuition assistance is otherwise available from the military department concerned.

5.2. Period of Entitlement for MGIB-SR Benefits:

- 5.2.1. Entitlement is for 10 years, and begins on the date the member meets all criteria in paragraph 5.1.2.
- 5.2.2. Entitlement for educational assistance expires:
- 5.2.2.1. At the time the member exhausts the authorized months of entitlement benefits; or,
- 5.2.2.2. At the end of a 10-year period extending from the date of entitlement specified on the member's NOBE except as cited in paragraph 5.2.5.

5.2.3. Entitlement to educational assistance is suspended on the date the member is granted an authorized period of absence and transfers to the IRR or to the Selected Reserve of another component. Members who separate for valid reasons, in accordance with applicable military regulations, following a period of satisfactory service, may regain eligibility for educational assistance, if reaffiliation with the Selected Reserve occurs within 1 year (3 years if serving a missionary obligation), or in cases of members who have served on active duty in an AGR program, returns to traditional guard status, and are otherwise eligible for educational assistance and have not received the maximum assistance available.

5.2.3.1. Entitlement will be restored provided the remaining obligated Selective Reserve service is not less than the difference between the previous period of satisfactory Selected Reserve service performed and 6 years.

5.2.3.2. The member's original entitlement date on the NOBE will not change.

5.2.4. Entitlement to educational assistance terminates:

5.2.4.1. When a member enters active duty or full-time National Guard duty as a part of a Reserve Component Active Guard Reserve (AGR) or Training and Administration of Reserve (TAR) program. These individuals will normally be entitled to educational benefits under chapter 30 of Title 38; or,

5.2.4.2. When a member fails to participate satisfactorily in required training; or,

5.2.4.3. When a member receives financial assistance in the form of a Reserve Officers Training Corps (ROTC) Scholarship; or

5.2.4.4. When a member fails to reaffiliate in the Selected Reserve after an authorized period of absence; or,

5.2.4.5. When a member is discharged from military service.

5.2.5. Under the following circumstances, entitlement to MGIB-SR benefits may be continued or extended:

5.2.5.1. Members separated from the Selected Reserve because of a disability, which was not the result of the individual's own willful misconduct, will retain entitlement through the end of the 10-year delimiting date.

5.2.5.2. Members who separate from the Selected Reserve between 1 Oct 91 and 30 Sep 99, by reason of the inactivation of the person's unit of assignment or because of a reduction in authorized strength, as determined by the Service Secretaries, will retain entitlement through the original 10-year delimiting date.

5.2.5.3. Members who are prevented from pursuing their chosen program because of a physical or mental disability incurred or aggravated by service in the Selected Reserve may apply for an extension of the 10-year period. To extend entitlement, the member must apply to the DVA within 1 year after either the last day of the 10-year period or the last day of the disability, whichever is later.

5.2.5.4. Members who are already enrolled in an educational institution when their period of entitlement expires shall be extended to the end of that quarter or semester provided the member has not exhausted the authorized months of entitlement benefits. If the member is enrolled in an institution not operated regularly on a quarter or semester basis and the period of entitlement expires after a major portion of the course is completed, the benefit period will be extended to the end of the course, or for 12 weeks, whichever is less, provided the member has not exhausted the authorized months of entitlement benefits.

5.2.5.5. Members who, during the Persian Gulf War, were ordered to active duty pursuant to an order issued under Section 12301(a), 12301(d), 12301(g), 12302, or 12304 of Title 10, will have their benefit period extended for the period of active duty plus four months. These members will not be considered separated from the Selected Reserve during their period of active duty.

5.3. Unsatisfactory Participation and Recoupment of MGIB-SR Benefits:

5.3.1. Entitlement to MGIB-SR will be suspended on the date a member's participation is determined, by command authority, to be unsatisfactory as defined in DoDI 1215.18, and ANGI 36-3201, Air National Guard Separations Documents, paragraph 2.25, and 3.13.2. The member will be notified of the reason for loss of entitlement and given an opportunity to respond before a final determination of unsatisfactory participation is made and a termination of entitlement is processed. If a member is declared an unsatisfactory participant, termination of entitlement will be effective on the date of the suspension of entitlement.

5.3.2. A member who has been declared an unsatisfactory participant by command authority before completing the 6-year obligation incurred to qualify for MGIB-SR entitlement and who received educational assistance under this chapter, will, at the option of the ANG:

5.3.2.1. Be ordered to active duty for up to 2 years or the period of obligated Selected Reserve service remaining, whichever is less; or,

5.3.2.2. Be required to refund the United States Government an amount equal to the number of months of Selected Reserve service the member has remaining under the MGIB-SR obligation, divided by the original number of obligated months required for MGIB-SR entitlement; multiplied by the total amount of educational assistance

5.3.2.2. (Cont) provided to the member under this chapter. The amount of this refund will bear interest at the rate equal to the highest rate being paid by the United States on the day on which the refund is determined to be due for securities having maturities of 90 days or less. Such interest will accrue from the day on which the member is first notified of the amount due. Any such refund will not affect the member's period of obligation.

5.3.3. The ROM shall enter the MGIB-SR Benefits Recoupment Status code in PDS when entitlement is terminated for Unsatisfactory Participation.

5.3.4. The Secretary of the Air Force has the authority to waive all or part of the refund due the United States Government if the Secretary determines that the failure to participate satisfactorily in required training was due to reasons beyond the control of the member.

5.4. Active Duty Montgomery GI Bill - Chapter 30:

5.4.1. Any Selected Reserve Active Guard/Reserve (AGR) member who began their first active duty tour (other than IADT, other training, and temporary AGR tours), on or after 1 Jul 85 is eligible for benefits under chapter 30 of Title 38 USC. ROMs will develop procedures to ensure that members meeting these criteria are counseled and given the opportunity to enroll or disenroll from the MGIB Program within 2 weeks of entry on active duty. Members meeting these criteria will automatically be enrolled in this program 15 days after the date first counseled, unless they formally elect not to participate within the 15 days.

5.4.2. Chapter 30 is a contributory program. Each member must have \$1,200 (usually \$100 per month for 12 months) deducted from their salary in order to participate. Enrolled members who elect not to use the benefit or fail to qualify for the benefit may not recover the \$1,200 or portion thereof, previously deducted from their pay.

5.4.3. Member must complete 30 months of their AGR tour to be eligible for chapter 30 benefits. If the member separates before completing at least 30 months active duty, the member will not be entitled to any chapter 30 benefits.

5.4.4. Prior active duty service members, who originally enlisted under a "two by four" program, may be entitled to chapter 30 MGIB benefits. Under this program, members must have served at least 2 years active duty after 1 Jul 85, and subsequently enlisted in a component of the Selected Reserve for at least 4 years. The member should be advised to seek Veterans Administration (VA) verification of eligibility under 38 USC chapter 30, "two by four" program.

5.4.5. Educational assistance may be provided for the pursuit of any program of education that is approved by the DVA, to include undergraduate or graduate degrees, cooperative training, independent study, vocational technical training, apprenticeship programs, correspondence courses and flight training. All chapter 30 benefits are paid directly to the member. The amount paid is based on the number of credit hours the member is enrolled.

5.4.6. Chapter 30 benefits are designed to be used after the member has separated from active duty. However, once a member has served for 24 months, benefits may be used while the member is on active duty, but benefits are limited to the amount of tuition and fees only.

5.4.7. A member's period of eligibility to receive educational assistance under chapter 30 shall expire at the end of a 10-year period extending from the date of the member's last discharge or release from active duty.

5.4.8. ANG Separation Incentive Program. Certain members who separated voluntarily may be eligible to participate in the MGIB, chapter 30 as follows:

5.4.8.1. Members voluntarily separated under voluntary separation incentive (VSI) or special separation benefits (SSB), including those who previously elected not to participate, may be extended the opportunity to enroll in the MGIB Program, chapter 30. They include the following:

5.4.8.1.1. Service members enrolled in the Veterans Educational Assistance Program (VEAP), as well as those not enrolled who entered active duty during the VEAP period, shall be granted an opportunity to enroll in the MGIB Program before involuntarily separating. Members enrolled in the VEAP shall, as a condition of receiving MGIB benefits, irrevocably elect to participate in the MGIB Program instead of receiving benefits under the VEAP. A member cannot be enrolled in both programs.

5.4.8.1.2. Service members who do not meet the eligibility criteria for conversion from the "Vietnam Era GI Bill".

5.4.8.2. To qualify for enrollment, members must:

5.4.8.2.1. Be on active duty on or after 30 Sep 90.

5.4.8.2.2. Be subject to voluntary separation that will result in an honorable discharge on or after 5 Dec 91.

5.4.8.2.3. Contribute \$1200 in the form of cashiers' check or money order to the Treasurer of the United States through the member's Accounting and Finance office.

5.5. Concurrent Education Assistance:

5.5.1. Members who first became eligible for MGIB-SR benefits must relinquish that eligibility should he or she elect to become an AGR. This means that a guardsman who first became eligible for MGIB-SR benefits after 1 Jul 85, and who then entered an AGR program, would lose his or her eligibility to MGIB-SR benefits. These members would then be entitled for chapter 30 benefits only, if otherwise eligible.

5.5.2. A member cannot use the same period of service to establish entitlement under both MGIB-SR and chapter 30. However, because of separate periods of service, a member may satisfy the entitlement criteria for both programs. The aggregate period for assistance under two or more provisions of law is 48 months (or its part-time equivalent). In these cases Service members may exhaust their entitlement under one provision then continue receiving education assistance under another provision until the aggregate 48 months of entitlement has been used.

5.5.3. In no case shall an individual entitled to educational assistance under more than one program be allowed to receive assistance under two or more programs concurrently.

5.6. Administration. The MGIB is administered by the VA and is subject to congressional guidance. Courses totaling 12 semester hours or more, or equivalent quarter hours as determined by the VA, are considered full time study. Members are charged one full day of entitlement for each day of full-time benefits paid. For example, if a member is pursuing half-time study (6 semester hours) the member will be charged one-half the monthly entitlement for benefits. The same holds true for three-quarters time (9 semester hours) and less than half-time (less than 6 semester hours). MGIB benefits are based on enrollment in a program of education approved by the VA for MGIB participation.

5.7. ROM Responsibilities:

5.7.1. It is the ROM's responsibility to counsel traditional guardsmen on their entitlement to MGIB-SR benefits within 30 days of their first 6-year enlistment, extension or reenlistment on or after 1 Jul 85.

5.7.2. ROMs must ensure that all traditional members, who become entitled to MGIB-SR benefits, complete a DD Form 2384-1, for MGIB-SR benefits. This form shall be issued to each member of the Selected Reserve at the time that a member entitled to educational assistance becomes eligible for the receipt of educational assistance, regardless of his or her intent to use the benefit. The original form shall become a permanent part of the service member's official military record. Only one form shall be issued to each eligible member.

5.7.2.1. Block 9 of DD Form 2384-1, Notice of Basic Eligibility (NOBE), will be the date the member meets requirements for benefit eligibility. This date should not be later than the date the NOBE is issued.

5.7.2.2. ROMs must update every ANG members' record in PDS to show current MGIB-SR and chapter 30 (when applicable), entitlement, eligibility, and termination data. Attachment 10 identifies MGIB DINS and eligibility codes.

5.7.2.3. Following PDS update showing eligibility for benefits, give a copy of the NOBE to the member to be submitted to the VA when requesting MGIB benefits. Do not use future dates to show eligibility when updating the member's MGIB record.

5.7.2.4. A corrected copy of the NOBE may be issued to change an erroneous date of basic entitlement. This corrected DD Form 2384-1 shall be clearly marked "CORRECTED COPY".

5.7.2.5. Care must be taken to safeguard blank forms. The wing or group commander will appoint a commissioned officer or noncommissioned officer (grade technical sergeant or above), to requisition, control, and issue the DD Form 2384-1. This individual may also be designated as the authenticating official. This individual should be the ROM, or in the case of a GSU, this individual should be the Recruiting and Retention NCO (RRNCO), if he or she meets the grade requirements above. RRNCOs will then forward the original signed and dated copy of the DD Form 2384-1 to the ROM for filing in the member's UPRG. The ROM will also accomplish the PDS update.

5.7.3. It is the ROM's responsibility to notify and counsel all AGRs on their eligibility for chapter 30 MGIB benefits within 2 weeks of entry on active duty. Members will be given the opportunity to enroll or disenroll from the MGIB Program. ROMs will ensure that the member completes a DD Form 2366, Montgomery GI Bill Act of 1984, for chapter 30 benefits, within 15 days after the date first counseled. ROMs should forward copy 1 to the Air Reserve Personnel Center (ARPC) at HQ ARPC/DSMP, 6760 East Irvington Place, Denver, CO 80279-8000. Copy 2 shall become a permanent part of the service member's official military record. ROMs should forward copy 3 to DFAS-DE-P/PFPM, 6760 East Irvington Place, Denver, CO 80279-8000. Copy 4 should be given to the member.

5.7.4. If an eligible AGR member has not declined chapter 30 benefits within 15 days after the date first counseled, it is the ROM's responsibility to code the member in PDS as "Enrolled", and start payroll deduction for the \$1,200.

DONALD W. SHEPPERD
Major General, USAF
Director, Air National Guard

OFFICIAL

DEBORAH GILMORE
Chief

Attachment 1**REFERENCES, ABBREVIATIONS, ACRONYMS AND TERMS****References:**

ANGI 36-2002	Enlistment and Reenlistment in the ANG and as a Reserve of the Air Force
ANGI 36-2101	Assignments Within the Air National Guard
ANGI 36-2602	ANG Recruiting Expenditure and Management of Recruiting and Retention Programs
ANGI 36-2802	Air National Guard Special Trophies and Awards
ANGI 40-501	Air National Guard Fitness Program
NGR (AF) 35-11	ANG Weight Management Program
ANGR 211-1/ NGR 600-12	National Guard Family Program
NGB Form 36	Stipend Program Ready Reserve Healthcare Professions (Reserve Service Baccalaureate Nursing Students) Written Agreement
NGB Form 36-1	Stipend Program Ready Reserve Healthcare Professions (Reserve Service Registered Nurses) Written Agreement
NGB Form 36-2	Health Professionals Loan Repayment Program Written Agreement
NGB Form 36-3	ANG Cash Bonus for Selected Healthcare Professionals Written Agreement
NGB Form 36-4	Incentive Payment Authorization
NGB Form 36-5	Enlisted Student Loan Repayment Program (SLRP) Written Agreement
NGB Form 36-6	Reenlistment Bonus Written Agreement
NGB Form 36-7	Affiliation Bonus Written Agreement
NGB Form 36-8	Non Prior Service (NPS) Enlistment Cash Bonus Written Agreement
NGB Form 36-9	Prior Service (PS) Enlistment Cash Bonus Written Agreement
NGB Form 38-4	Incentive Payment Authorization
NGB Form 38-5	Incentive Bonus Case File Cover Sheet
NGB Form 173	Record of Retention Interviews
NGB Form 173-1	Retention Interview Form
AFI 10-201	Status of Resources and Training Systems
AFI 36-2108	Airman Classification
AFI 36-2903/ ANGSUP 1	Dress and Personal Appearance of ANG Personnel
AFI 38-138	Records Disposition - Procedures and Responsibilities
AF Form 406	Miscellaneous Obligation Reimbursement Document
AF Form 3046	The Air Force Ready Reserve Stipend Program Certificate of Enrollment
DFAS-DER 177-102	Commercial Transactions at Base Level (PA)
DD Form 4	Enlistment/Reenlistment Document - Armed Forces of the United States
DD Form 2366	Montgomery GI Bill (MGIB) Act of 1984
DD Form 2384.1	Selective Reserve Educational Assistance Program Notice of Basic Eligibility (NOBE)
DD Form 2475	DoD Educational Loan Repayment Program (LRP) Annual Application

Abbreviations/Acronyms

AAFES	Army Air Force Exchange System
AD	Active Duty
ADT	Active Duty Training
AFRRSP	Air Force Ready Reserve Stipend Program
AFSC	Air Force Specialty Code
AG	Adjutant General

AGR	Active Guard and Reserve
ANG/MPPAR	Air National Guard/Retention Operations Section
ANG/FM	Air National Guard/Financial Management
ANGUS	Air National Guard of the United States
AT	Active Training
BCN	Bonus Control Number
BMT	Basic Military Training
CCAF	Community College of the Air Force
CMP	Career Motivation Program
DoD	Department of Defense
DOE	Date of Enlistment
DP	Director of Personnel
ETS	Expiration Term of Service
ETS	Estimated Time of Separation
ESSO	Executive Support Staff Officer
GED	General Education Diploma
GSU	Geographically Separated Units
HRFM	Human Resource Force Manager
IADT	Initial Active Duty Training
IDT	Inactive Duty Training
LRP	Loan Repayment Program
MGIB	Montgomery GI Bill
MPMO	Military Personnel Management Officer
MSO	Military Service Obligation
NGB-FP	National Guard Bureau - Family Programs
NCESGR	National Committee for Employee Support of the Guard and Reserve
NPS	Non Prior Service
OPR	Office of Primary Responsibility
PAS	Personnel Accounting Symbol
PCE	Professional Continuing Education
PDS	Personnel Data System
PETS	Prior to Expiration Term of Service
PLUS	Parent Loans for Undergraduate Students
PMEC	Professional Military Education Center
POC	Point of Contact
PS	Prior Service
PSEB	Prior Service Enlistment Bonus
RIP	Report of Individual Person
ROM	Retention Office Manager
RRNCO	Recruiting and Retention Noncommissioned Officer
RRS	Recruiting and Retention Supervisor
SAV	Staff Assistance Visit
SDI	Special Duty Identifier
SEA	Senior Enlisted Advisor
SLRP	Student Loan Repayment Program
SSB	Special Separation Benefits
TOE	Term of Enlistment
UCA	Unit Career Advisor
UMD	Unit Manning Document
USPFO	U.S. Property and Fiscal Office
UTA	Unit Training Assembly
VEAP	Veterans Educational Assistance Program
VSI	Voluntary Separation Incentive

Terms

1. Accredited Institution. Any educational institution that provides education at the post-secondary level that is accredited by a nationally recognized accrediting agency or association or by an accrediting agency or association recognized by the Secretary of Education. Included in this definition are those institutions that are in the process of seeking accreditation and currently have provisional or conditional accreditation, or candidacy status for accreditation.
2. Accredited Program. An educational program that is approved by an agency or association recognized for such purpose by the Secretary of Education and/or by the Joint Commission on Accreditation.
3. Active Duty (AD). Full-time duty in the active Military Service of the United States. Such term includes full-time training duty, annual training duty, and attendance, while in the active Military Service, at a school designated as a Service school by law or by the Secretary of the Military Department concerned. It does not include full-time National Guard duty.
4. Active Duty for Training (ADT). A tour of AD that is used for training members of the Reserve components to provide trained units and qualified persons to fill needs of the Armed Forces during war or national emergency and such other times as national security requires. It includes annual training, special tours of ADT, school tours, and the initial duty for training performed by non-prior Service enlistees.
5. Active Guard and Reserve (AGR) Personnel. National Guard and Reserve members who are on full-time active duty or full-time National Guard duty for a period of 180 consecutive days or more for the purpose of organizing, administering, recruiting, instructing, or training the Reserve Components, and are paid from the Reserve Personnel Appropriations of a Military Department. Such term does not include duty performed for the purpose of interdiction and counter-drug activities for which funds have been provided under section 112 of title 32. (See Section 101(d)(6)(B) of 10 U.S.C. for other exclusions.)
6. Active Status. Status of all Reservists except those on an Inactive Status List or in the Retired Reserve.
7. Air Force Specialty Code (AFSC). A four or five digit number used to identify an Air Force Specialty (AFS). When a more specific identification of the position requirement and individual qualification is needed, an alpha prefix or suffix is used with the numerical codes.
8. Airman. An enlisted member of the Air National Guard of the United States (ANGUS).
 - 8.1. First Term Airman. Airman with not more than 6 years total military service.
 - 8.2. Mid Career Airman. Airman with more than 6 but not more than 10 years service.
 - 8.3. Career Airman. Airman with over 10 years total military service.
9. Anniversary Date. The date a service member completes a year of service in the Ready Reserve in which the member's service has been satisfactory under chapter 3 or 4 of this Instruction.
10. Annual Training (AT). The required active duty for training or field training performed each year to satisfy the annual training requirements of the Selected Reserve that are established in law and regulation. AT is normally performed during one consecutive period, but may be performed in increments of 1 or more days.
11. Assistant Retention Office Manager (ROM). A member of a federally recognized Air National Guard unit performing duties to assist the ROM.
12. Basic Military Training (BMT). A period of at least 6 weeks which provides transitional training from the civilian to military life style for non-prior service enlistees.
13. Basic Eligibility. For receiving MGIB benefits, basic eligibility for award of educational assistance is contingent on meeting the initial criteria outlined in this instruction and continued satisfactory participation in the Selected Reserve.

14. Bonus Control Number (BCN). A six-position number assigned by the ROM to each bonus case file to identify the year of initial payment, bonus type, and the sequential number of that bonus type.
15. Career Motivation Program (CMP). An ANG program designed to use formal retention interviews by commanders and supervisor to ensure career plans and goals, as well as career irritants are discussed. The purpose is to ensure the ANG is meeting the member's expectations, and to determine future intent.
16. Community College of the Air Force (CCAF). A fully accredited 2-year degree granting college established to serve Air Force enlisted personnel.
17. Critical Skill. Any AFSC designated by the Secretary of the Air Force as a skill that is wartime critical and needed to meet SORTS reporting requirements.
18. Critical Wartime Health Specialty. Health professional commissioned officer specialties critical to the needs of the Services, as determined by the Assistant Secretary of Defense for Health Affairs (ASD(HA)).
19. Date of Enlistment (DOE). The effective date of the member's enlistment or reenlistment.
20. Defaulted Loan. If a borrower fails to make an installment payment when due, the lender attempts, through a specified set of procedures, to collect on the loan. If the borrower still fails to make the payment, or it is reasonably concluded that the borrower no longer intends to repay, then the lender may file a default claim with a collection agency. The loan becomes immediately due and payable and the collection agency will actively attempt to collect from the borrower. Collection activities may include litigation.
21. Enlistment. An agreement for service in the Ready Reserve under Section 12103 of 10 U.S.C. (reference (d)).
22. Excess. Personnel assignments condition where an individual exceeds by number the total authorized strength within the unit for the AFSC of the UMD position to which assigned. Example: Three authorized UMD positions, four people assigned, one person is excess.
23. Expiration Term of Service (ETS). The date an airman is scheduled to complete, or completes, the service required by the enlistment contract or extension thereof.
24. Extension. A change to a term of enlistment that extends the amount of time executed on the original enlistment or a follow-on enlistment.
25. Geographically Separated Unit (GSU). An ANG unit at least 50 miles away from the servicing wing/MPF.
26. Inactive Duty Training (IDT). Authorized training performed by a member of a Reserve component not on active duty, or active duty for training, and consisting of regularly scheduled unit training periods, annual training programs, or equivalent training, and performed by them in connection with the prescribed activities of the Selected Reserve component of which they are a member.
27. Initial Active Duty for Training (IADT). A term used to identify the mandatory training or the equivalent, as determined by the Secretary of the Military department concerned, each member of an Armed Force must complete on initial entry into the Military Service to qualify in a military specialty or branch, as required by Section 671 of reference (d) for deployability on land outside the United States and its territories and possessions during war. For ANG, includes basic military training and technical skill training required for all enlisted accessions without prior military service.
28. Military Personnel Management Officer (MPMO). The Officer in charge of military personnel management at State headquarters.

29. Military Service Obligation (MSO). The total required service that each person who initially becomes a member of an Armed Force shall serve in that Armed Force unless sooner discharged, as prescribed by DoD Directive 1304.25.
30. Military Technician. A federal employee of the ANG who occupies a full time civilian position and is required by federal law to be a member of the ANG as a condition of employment under Title 32 USC, Section 709.
31. Non-prior Service Accessions. Individuals without prior military service, who have not completed IADT or its equivalent, who are appointed or enlisted directly into an Armed Force of the United States.
32. Officer. A commissioned member of the Air National Guard of the United States.
33. Personnel Data System (PDS). The official automated system used by all Air Force components for storage of personnel data.
34. Prior Service Accessions. Individuals who have previously served in an Armed Force of the United States, and such service included completion of a recognized BMT course of at least 6 weeks.
35. Prior to Expiration Term of Service (PETS) Separation. A separation effective on a date earlier than 90 days before the member's normal expiration term of service.
36. Professional Military Education Center (PMEC). The Air National Guard Educational facility located at McGhee Tyson Airport, Knoxville, TN.
37. Ready Reserve. The Ready Reserve is comprised of military members of the National Guard and Reserve, organized in units or as individuals, and liable for order to AD during war or national emergency. The Ready Reserve consists of three subcategories; i.e., the Selected Reserve, the Inactive Ready Reserve (IRR), and the Inactive National Guard (ING) as defined in DoD Directive 1215.6.
38. Reaffiliation. When a former Selected Reserve member returns to the Selected Reserve.
39. Recruiting and Retention Superintendent (RRS). A member of the State headquarters responsible for assisting base level personnel in the management of recruiting and retention programs.
40. Reenlistment. A second or subsequent enlistment in a Reserve component.
41. Report of Individual Person (RIP). A computer-generated product designed to provide record information on the military member.
42. Retention Office Manager (ROM). A member of a federally recognized ANG unit serving in a full-time AGR capacity as the Retention Office Manager.
43. Secondary School Graduate. For this Instruction, that term is limited to the following:
- 43.1. High School Graduate - High School Diploma. A diploma is issued to an individual who has attended and completed a 12-year or-grade day program of instruction. That diploma must be issued from the school where the individual is credited with the completion of program requirements.
- 43.2. High School Graduate - Adult Education Diploma. A secondary school diploma awarded for attending and completing an adult education or "external" diploma program, regardless of whether the diploma was issued by the State or by a secondary or post-secondary educational institute.
- 43.3. Alternate Credit Holder - Test-Based Equivalency Diploma. A diploma or certificate of General Education Development (GED) or other test-based high school equivalency diploma. That includes statewide testing programs such as the California High School Proficiency Examination (CHSPE), whereby examinees may earn a certificate of competency or proficiency. A State or locally issued secondary school diploma obtained solely on the basis of such equivalency testing is not to be considered a high school diploma.

- 43.4. Alternative Credit Holder - Home Study Diploma. A secondary school diploma or certificate typically awarded by a state, based on certification by a parent or guardian that an individual has completed his and/or her secondary school at home.
44. Selected Reserve. That part of the Ready Reserve consisting of Reserve units, as designated by the Secretary concerned, and of individual Reservists, in pay status, required to participate in IDT periods and annual training. The Selected Reserve also includes AGR personnel as well as Guardsmen and Reservists performing initial ADT.
45. Special Duty Identifier (SDI). A five-place number designed to identify the position held by a military member other than the member's primary skill position.
46. Staff Assistance Visit (SAV). A visit to units to review program elements and administration. The visit is normally conducted by higher headquarters.
47. Temporary Assignment as a Military Technician. For this Instruction, a military technician assignment is considered to be temporary when the assignment is for a period of less than 6 months and there is no expectation of continued employment as a military technician beyond that date.
48. Term of Enlistment (TOE). The amount of service time an individual is obligated to serve as the result of his or her enlistment, reenlistment or extension.
49. Termination. Removal of a participant from the bonus program after the receipt of one or more payments.
50. Total Service. Total years, months, and days service based on the member's pay date.
51. Unit. A military organization duly constituted by competent directive and defined in the manpower and personnel data system by a single Personnel Accounting Symbol (PAS) code.
52. Unit Career Advisor (UCA). A mid-career or career NCO selected by the Unit Commander to coordinate the unit career motivation program as an additional duty.
53. Unit Manning Document (UMD). A document containing all authorized wartime and pre or post mobilization manpower positions and personnel assigned those positions for an ANG unit.
54. UMD Vacancy. An actual UMD position that is neither occupied nor projected to be occupied by a student flight member. Each ANG unit and authorization is considered separately in this regard. Excesses in other AFSCs or units are not counted in determining vacancies.
55. Unsatisfactory Participation. The following constitutes failure to participate satisfactorily:
- 55.1. The accumulation of nine or more unexcused absences from scheduled IDT assemblies within any 12-month period; or,
- 55.2. The unexcused absence from AT or other required ADT in the Selected Reserve; or,
- 55.3. Transfer from the Selected Reserve, or discharge for misconduct, to include misconduct for purely military offenses.

Attachment 2

ANG 599R, Retention Budget & Loss Report

FY QTR

MPF ID

Advertising Items

	Description	Qty	Cost
Item			

Operational Expenditures

Description	Cost

Total Advertising	
Total Operational	
Total Cost	\$0.00

Incentive Program Obligations
(Include only Initial Payment Amounts)

Quarter Totals

	Number	Amount
NON PRIOR SERVICE		
PRIOR SERVICE		
REENLISTMENT		
ENLISTED AFFILIATION		
ENLISTED SLRP		
MEDICAL OFFICER CASH		
MEDICAL OFFICER STIPEND		
MEDICAL OFFICER SLRP		
TOTAL	0	\$0.00

Fiscal Year Totals

Number	Amount
0	\$0.00

Losses

(Please provide the reasons for members separating IAW exit surveys)

Quarterly Losses

Yearly Losses

Reasons

Lack of meaningful work	<input type="text"/>	Transfer to other ANG unit	<input type="text"/>
Lack of training	<input type="text"/>	Transfer to another reserve branch	<input type="text"/>
Family	<input type="text"/>	Transfer to active duty Air Force	<input type="text"/>
Civilian job conflict	<input type="text"/>	Transfer to other active component	<input type="text"/>
Unfair treatment	<input type="text"/>	ETS	<input type="text"/>
Leadership apathy	<input type="text"/>	Retirement	<input type="text"/>
Career progression	<input type="text"/>	Commission	<input type="text"/>
Deployment demands	<input type="text"/>	Medical DQ	<input type="text"/>
Supervisor	<input type="text"/>	Unit morale	<input type="text"/>
Cause/Not Recmd for Reenl	<input type="text"/>	Other	<input type="text"/>

Attachment 3

ANG INCENTIVE PROGRAM ELIGIBILITY VERIFICATION WORKSHEET

NAME: _____ RANK: _____ SSN: _____

DRILL STATUS: YES _____ NO _____ PAFSC: _____ DAFSC: _____

PROJECTED DATE OF ENLISTMENT, REENLISTMENT, OR APPOINTMENT: _____

PROJECTED TERM OF ENLISTMENT OR REENLISTMENT: _____ years _____ months _____ days

DAFSC (MPF) UMD STRENGTH: Authorized _____ Assigned _____

TIME REMAINING ON ACTIVE DUTY: _____ years _____ months _____ days _____ N/A

MILITARY SERVICE OBLIGATION INCURRED DATE: _____

TOTAL MILITARY SERVICE (use pay date): _____ years _____ months _____ days

PALACE CHASE PARTICIPANT: Yes _____ No _____

PREVIOUS RESERVE COMPONENT BONUS: Enlistment _____ Reenlistment _____ Medical Incentive _____ None _____

ANY GUARANTEED STUDENT LOANS: Yes _____ No _____

RECRUITER: _____

TO BE COMPLETED BY THE RETENTION OFFICE MANAGER

If enlisting or reenlisting for the term indicated, or if appointed to a qualifying medical position, this member may be entitled to the incentive program identified below. Enlistment, reenlistment, or appointment after this date will require a reevaluation of eligibility. Member must apply to the ROM following enlistment/reenlistment/appointment to complete required documents.

_____ Non-Prior Service Enlistment Bonus (6 year enlistment)

_____ Prior Service Enlistment (6 year enlistment)

_____ Affiliation (Remaining MSO but not less than 3 year enlistment)

ANG INCENTIVE PROGRAM ELIGIBILITY VERIFICATION WORKSHEET

_____ Reenlistment (6 year reenlistment)

_____ Student Loan Repayment (6 year enlistment or reenlistment)

_____ Health Professional Incentive Circle One: Cash MOSLRP Stipend

RETENTION OFFICE MANAGER _____ DATE _____

Attachment 4
SAMPLE EXIT SURVEY

DATE

NAME: _____ **RANK:** _____

UNIT: _____ **SECTION:** _____

Total Time in Unit: _____ **Total Time in Military:** _____

PURPOSE OF INTERVIEW:

Identify the real reasons members leave.
Identify areas of concern or trends.

(Explain to separating members that although they are leaving, their candidness will help the overall effectiveness of training unit members.)

Discuss the following with the separating member:

- Reason for leaving
 - Was the Commander supportive/visible?
 - Did the member receive career counseling from the UCA? From the Commander?
 - Was cross-training an option? Was it looked into?
 - Does the separating member plan to further his/her military career? If so, how?
-

INTERVIEWER'S REMARKS/FINDINGS: (continue on reverse)

(Interviewer's Signature)

(Date)

Attachment 4 (continued)

SAMPLE EXIT QUESTIONNAIRE

Dear Member: Although you are leaving, your opinions about the ANG are important to us. Your cooperation in fulfilling out the questionnaire is important in our efforts to make the ANG a valuable experience to its members. Our commanders are very interested in your responses to the following questions, and have made changes, and continues to make changes, as a result of what we hear from our separating members. Please respond frankly and without reservations. Your candid comments and observations will be sincerely appreciated. Do not use your name unless you desire to do so.

1. What unit are you leaving: _____ Section: _____

2. Indicate your main purpose for participation in the ANG.

- _____ To fulfill a military obligation.
- _____ To help perform the mission of the unit.
- _____ To contribute through meaningful work.
- _____ To receive the extra pay.
- _____ To receive educational benefits.
- _____ To receive technical training.
- _____ For the camaraderie and friendships.
- _____ For the base services and facilities.
- _____ For retirement benefits.
- _____ Other: _____

3. Indicate your reason for leaving the ANG.

- _____ Expiration Term of Service (ETS).
- _____ Retirement.
- _____ Transfer to another unit (Where: _____).
- _____ Transfer to the Air Force Reserve (Where: _____).
- _____ Transfer to Active Duty Air Force.
- _____ Tour with NGB or ANGRC.
- _____ Family.
- _____ Leaving area due to civilian employment.
- _____ Civilian job conflict.
- _____ Own convenience.
- _____ Other: _____

4. If leaving at ETS, what kept you from reenlisting?

Attachment 4 (Continued)

ANSWER THE FOLLOWING QUESTIONS BY CIRCLING THE NUMBER ON THE LINE WHICH BEST SHOWS YOUR FEELINGS TOWARD THE QUESTION. USE THE SPACE FOR COMMENTS TO EXPAND.

5. **GOALS** - How well were your goals met for joining the ANG (question #2)?

1 2 3 4 5 6 7 8 9

NOT AT ALL

SOMEWHAT

A GREAT DEAL

COMMENTS. _____

6. **JOB ASSIGNMENT** - Do you feel that you were performing meaningful work while a member of the ANG?

1 2 3 4 5 6 7 8 9

NOT MEANINGFUL

ADEQUATE

VERY MEANINGFUL

COMMENTS. _____

7. **TRAINING** - How would you rate the quality of AFSC training you received during UTAs and annual training?

1 2 3 4 5 6 7 8 9

VERY POOR

ADEQUATE

EXCELLENT

COMMENTS. _____

Attachment 4 (Continued)

8. SUPERVISION - How would you rate the quality of supervision you received?

1 2 3 4 5 6 7 8 9

VERY POOR

ADEQUATE

EXCELLENT

COMMENTS. _____

9. OVERALL LEADERSHIP - How would you rate the quality of the overall leadership you received as a member of the ANG?

1 2 3 4 5 6 7 8 9

VERY POOR

ADEQUATE

EXCELLENT

COMMENTS. _____

10. PROMOTION OPPORTUNITIES - Did you have opportunities for advancement?

1 2 3 4 5 6 7 8 9

NO OPPORTUNITY

REASONABLE OPPORTUNITY

EXCELLENT OPPORTUNITY

Attachment 4 (Continued)

COMMENTS. _____

11. RECOGNITION - How well do you feel that the ANG recognizes its members?

1 2 3 4 5 6 7 8 9

NOT AT ALL

ADEQUATELY

VERY WELL

COMMENTS. _____

Attachment 5**UNIT CAREER ADVISOR (UCA) POSITION DESCRIPTION**

A5.1. POSITION TITLE. Unit Career Advisor (UCA).

A5.2. ORGANIZATIONAL LOCATION. Unit Squadron or Flight (Suggested one UCA per 50 members).

A5.3. PREPARED BY ANG/MPPAR.

A5.4. SPECIALTY SUMMARY. The position of Unit Career Advisor (UCA) is an additional duty located within each squadron/flight. Direction and guidance are provided by the Retention Office Manager (ROM). The UCA will serve as the focal point for all retention related issues/programs at unit level. Maintains the unit Career Motivation Program (CMP).

A5.5. DUTIES AND RESPONSIBILITIES:

A5.5.1. Schedules all required interviews. Provides commander and supervisors with current retention related information and policies. Conducts follow-up interviews. Refers members to appropriate functions when necessary (i.e. ROM, Social Actions, Chaplain, etc.).

A5.5.2. Identifies all airmen selected for reenlistment who have not made a career decision to reenlist 6 months prior to their ETS. Notification will be made to the ROM not less than 5 months prior to the member's ETS.

A5.5.3. Provides career motivation information (CMP, benefits, services), and training to the unit commander and supervisors. This is accomplished through direct contact, briefings, and unit commander advisory committee meetings.

A5.5.4. Maintains a retention-related advertising and publicity program. At a minimum, should be, but is not limited to, a bulletin board containing the UCA's picture with name and phone number.

A5.5.5. Along with the unit commander, develops and maintains a unit minority retention program with the help of the Human Resources Force Manager (HRFM).

A5.5.6. Maintains NGB Forms 173, Record of Retention Interview, for all enlisted members with 20 years total military service or less. A separate form will be kept on each of these members.

A5.5.7. Keeps abreast of current retention information to include family and employer support programs.

A5.5.8. Should attend all UCA training seminars conducted by the ROM.

A5.6. SPECIALTY QUALIFICATIONS:

A5.6.1. Minimum grade should be staff sergeant and maximum grade should be master sergeant

A5.6.2. Should not have any other additional duties.

A5.6.3. Should not be a section chief.

A5.6.4. Should have initial training as soon as possible after appointment (by spending time with the ROM and/or through the UCA outreach course).

A5.6.5. Must possess good public relations and public speaking skills.

A5.6.7. Individual must project a favorable image IAW AFI 36-2903, ANGI 40-501, and NGR (AF) 35-11.

Attachment 6**UNIT CAREER ADVISOR (UCA)
STAFF ASSISTANCE VISIT CHECKLIST**

A6.1. This checklist is to be used as a guideline for helping Unit Career Advisors (UCA) prepare for staff assistance visits (SAVs). As this is a guideline, it contains only minimum requirements. Additional items should be added to meet your unit's needs.

A6.2. Retention issues/irritants: Does the UCA attempt to ensure career motivation issues/irritants are addressed at the lowest level (supervisor, first sergeant, commander, etc.) prior to referral to Retention Office Manager (ROM)? Is documentation accomplished when appropriate?

A6.3. Retention Awareness:

A6.3.1. Does the UCA brief the commander on a regular basis on matters concerning issues which may affect unit retention?

A6.3.2. Does the UCA provide career motivation information and assistance to the unit commander and supervisors?

A6.3.3. Does the UCA keep informed on opportunities and benefits available to ANG enlisted members such as training requirements, retraining options, incentive program eligibility, civilian and military education opportunities, and other benefits and services available to members and their families?

A6.3.4. Does the UCA conduct annual career planning briefings to ensure members approaching ETS are provided information on the most current ANG benefits and entitlements which may affect career plans? Does the UCA supplement these briefings with appropriate printed materials?

A6.4. Interviews:

A6.4.1. Does the UCA ensure that commanders/ supervisors conduct interviews within time frames outlined in the Retention Instruction?

A6.4.2. Does the UCA conduct follow-up interviews upon request? Does the UCA make him/herself available to counsel members?

A6.4.3. Does the Unit Career Advisor have an area available for conducting interviews which is private and free from distractions?

A6.5. NGB Form 173:

A6.5.1. Does the UCA ensure all records are maintained in an area which meets the requirements outlined in the Privacy Act of 1974?

A6.5.2. Does the UCA ensure all required documentation is contained within?

A6.5.3. Does the UCA ensure that documents within pertain to past interviews only?

A6.5.4. Does the UCA ensure that a record is being maintained for all enlisted personnel (at least all those under 20 years service) within the unit?

A6.6. Referrals. Is the UCA aware of the many offices/agencies available to unit members should they require additional assistance?

A6.7. Advertising & Publicity:

A6.7.1. Is the UCA's picture, along with name and phone number, conspicuously displayed throughout the unit?

A6.7.2. Does the UCA brief unit members on occasion during unit commander's calls?

A6.7.3. Upon questioning, do unit members know who their UCA is?

A6.8. Training Attendance:

A6.8.1. Has the Unit Career Advisor had initial training?

A6.8.2. Does the UCA attend all quarterly and annual training conducted by the Retention Office Manager?

Attachment 6 (Continued)

**UNIT CAREER ADVISOR (UCA)
STAFF ASSISTANCE VISIT CHECKLIST**

A6.9. Selection Criteria:

A6.9.1. Is the UCA a volunteer?

A6.9.2. Is the UCA someone to whom members feel a positive rapport with?

A6.9.3. Does the UCA present a favorable image?

A6.9.4. Does the UCA have any other additional duties?

A6.10. Minority Retention: Is the UCA aware of items within the unit which could affect female and minority retention?

Attachment 7

AFFILIATION BONUS PAYMENT DETERMINATION WORKSHEET

NAME _____	SSN _____	UNIT _____	
AMOUNT TO BE PAID COMPENSATION			
	<u>YEAR</u>	<u>MONTH</u>	<u>DAY</u>
Expiration Military Service Obligation =	_____	_____	_____
(NOTE: This date = +8 years - 1 day from enlistment date)			
Minus			
Date of current enlistment (in ANG) =	_____	_____	_____
Equals			
Time Eligible (Remaining MSO) =	_____	_____	_____
Total time eligible _____ years x 12 =	_____	months	
plus	_____	months	
Equals total months eligible =	_____	months	
(whole months [30 days] only)			
times	\$50	dollars	
Equals total amount entitled =	\$ _____		
<hr/>			
NOTE: If the period of eligibility is more than 18 months, two payments will be made.			
Initial payment (50%) entitled upon enlistment date:	\$ _____		
Second payment (50%) entitled on 6 th anniversary of MSO:	\$ _____		
Original MSO incurred date: _____	Year	Month	Day
Plus 6 years			
Sixth anniversary of MSO _____	Year	Month	Day

Attachment 8

BONUS CONTROL NUMBER DEFINITIONS

Each ANG member who is enrolled in one of the authorized ANG bonus programs will be assigned a bonus control number (BCN). This BCN will consist of a 6-position number which will reflect the following information:

a. Positions 1 and 2 will identify the fiscal year (FY) in which the first installment (Initial Payment) is to be made.

b. Position 3 will be used to show the bonus identifier number as listed below:

BONUS IDENTIFIER CODE	BONUS TYPE
1	NPS Enlistment Bonus
2	Reserved
3	Reserved
4	6-Year Reenlistment Bonus with less than 6 years' service
6	6-Year Reenlistment Bonus with over 6 but not over 10 years' service
7	Affiliation: Less than 19 months' MSO remaining
8	Affiliation: More than 18 months' MSO remaining
9	Prior Service Enlistment Bonus
0	Student Loan Repayment Program

c. Positions 4, 5 and 6 will be used for sequential numbering of each bonus, i.e., 001, 002, 003, etc.

Example: A BCN showing the 21st prior service enlistment bonus for FY 98 would appear as 989021.

Attachment 9

**AIR NATIONAL GUARD
HEALTH PROFESSIONS
STIPEND PROGRAM
APPLICANT INFORMATION WORKSHEET**

NAME: _____

RANK: _____

SSN: _____

ADDRESS: _____

HOME PHONE NUMBER: _____

WORK PHONE NUMBER: _____

ANG UNIT MEMBERSHIP:

NAME OF UNIT: _____

ADDRESS: _____

TELEPHONE: _____

FAX NUMBER:

CIVILIAN: _____

MILITARY: _____

NAME OF COLLEGE OR RESIDENCY PROGRAM:

ADDRESS: _____

TELEPHONE (DIRECTOR OF GME): _____

NOTE: Any changes in the above information at any time during your participation in this program MUST be immediately communicated with ANG/MPPAR to ensure continuation of this benefit.

Attachment 10

MONTGOMERY GI BILL (MGIB) ELIGIBILITY STATUS CODES

MGIB-SR (CHAPTER 1606) CODES:

ENTITLED:

F = ENTITLED

Service member meets all entitlement criteria under the provisions of Title 10 United States Code (U.S.C.) chapter 1606.

Q = ENTITLED

Service member has reaffiliated with the Selected Reserve after period of authorized non-availability.

R = ENTITLED

Service member separated from the Selected Reserve due to disability not of the individual's own willful misconduct.

6 = ENTITLED

Service member involuntarily separated from the Selected Reserve and is entitled to education benefits IAW the Selected Reserve Transition Program.

NOT ENTITLED:

B = NOT ENTITLED

Service member is in receipt of a Reserve Officers Training Corps (ROTC) scholarship.

C = NOT ENTITLED

Service member has never executed a 6-year contract or service obligation in the Selected Reserve after June 30, 1985.

D = NOT ENTITLED

Service member has executed a 6-year contract or service obligation in the Selected Reserve after 30 June 1985 but has not completed Initial Active Duty for Training (IADT) as prescribed by the Secretary of the Military Department in the Selected Reserve.

E = NOT ENTITLED

Service member did not receive a secondary school diploma or equivalency certificate before completion of IADT (non-prior service) or before execution of a 6-year contract or obligation in the Selected Reserve (prior service).

G = NOT ENTITLED

Correction of an erroneous report of entitlement. No recoupment required.

ENTITLEMENT TERMINATED:

H = ENTITLEMENT TERMINATED

Service member has been determined to be an unsatisfactory participant.

I = ENTITLEMENT TERMINATED

Attachment 10 (Continued)**MONTGOMERY GI BILL (MGIB) ELIGIBILITY STATUS CODES**

Expiration of 10-year benefit period.

K = ENTITLEMENT TERMINATED

Service member is in receipt of a ROTC scholarship (under section 2107) and was previously entitled.

L = ENTITLEMENT TERMINATED

Service member died or was discharged from the military service while a satisfactory participant.

S = ENTITLEMENT TERMINATED

Active Guard Reserve (AGR)/Statutory Tour member no longer entitled to MGIB-SR.

5 = ENTITLEMENT TERMINATED

Member failed to reaffiliate in the Selected Reserve before the end of an authorized period of non-availability.

ENTITLEMENT SUSPENDED:

M = ENTITLEMENT SUSPENDED

Service member awaiting final determination of unsatisfactory participation or performance status.

N = ENTITLEMENT SUSPENDED

Service member has been granted a period of authorized non-availability for up to three years.

P = ENTITLEMENT SUSPENDED

Service member has been granted a period of authorized non-availability for up to one year.

ACTIVE DUTY MGIB (CHAPTER 30) CODES*:

1 = INELIGIBLE

Member first entered Active Duty prior to 850701.

5 = ENROLLED

Member on Active Duty for a period of obligated service for 3 years or more.

6 = INELIGIBLE

Member declined enrollment.

*There are other codes available for the chapter 30 program. The most commonly used are indicated here.