

ANNEX K TO DD FORM 4
STATEMENT OF UNDERSTANDING - THE ARMY NATIONAL GUARD (ARNG)
MONTGOMERY GI BILL KICKER PROGRAM (10 USC 16131)
Form use of this form, see AR 135-7. The proponent agency is ODCSPER.

DATA REQUIRED BY THE PRIVACY ACT OF 1974

AUTHORITY: Title 10, USC, chapter 1606, Title 5, USC and section 552a
PRINCIPAL PURPOSE: To explain obligation and eligibility requirements for entitlement under the Selected Reserve Montgomery GI Bill (MGIB-SR) (10 USC 16131) and to ensure that your understanding of these conditions is a matter of record.
ROUTINE USES: To record your eligibility, prescribe your entitlement, and provide you with the contract terms of the MGIB-SR Kicker Incentive.
DISCLOSURE: Disclosure of your SSN is voluntary. If you do not complete this form you cannot participate in the MGIB-SR Kicker Program.

SECTION I - APPLICABILITY

All eligible persons, who enlist, reenlist, or extend in the Army National Guard for the MGIB-SR Kicker Incentive Program, will complete immediately upon swearing to or affirming the oath of enlistment, reenlistment, or extension. This statement of understanding will be completed by enlisting, reenlisting or extending for the MGIB-SR Kicker Incentive Program.

SECTION II - INSTRUCTIONS

The service representative will read and explain the MGIB-SR Kicker Incentive Program requirements outlined on this form and staple a copy of this form (initialed, signed and dated) to each copy of the DD Form 4/1 and 4/2.

SECTION III - ACKNOWLEDGMENT/ELIGIBILITY

1. In connection with my enlistment, reenlistment or extension in the Army National Guard for entitlement to the MGIB-SR Kicker, I hereby acknowledge eligibility by my initials and signature that I meet the following criteria:

a. I am a non-prior service enlistee enlisting into an ARNG unit for a minimum of 6 years;
_____ ; and
(Initials)

(1) I am in Category I-III A on the Armed Services Vocational Aptitude Battery (ASVAB) score of 50 or higher; _____ ; and
(Initials)

(2) I meet eligibility requirements to receive basic MGIB-SR benefit; _____ ; or
(Initials)

b. I am an ARNG soldier who has served three or more consecutive years in the ARNG and I am immediately reenlisting or extending my current enlistment to serve a period of not less than six years in the ARNG as of the date of this contract; _____ ; and
(Initials)

(1) I am in skill level 1 or 2 (in grade of sergeant or below) _____ ; and
(Initials)

(2) I hold the PMOS for the position I am reenlisting or extending for; _____ ; and
(Initials)

(3) I meet eligibility requirements to receive basic MGIB-SR benefits; _____ ; or
(Initials)

c. I am a prior service soldier enlisting or reenlisting directly from the Active Army or within 30 days of Expiration Term of Service from the Active Army in an eligible Kicker unit or MOS for a minimum of 6 years _____ ; and
(Initials)

(1) I am in skill level 1 or 2 (in grade of sergeant or below) _____ ; and
(Initials)

(2) I hold the PMOS of the position I am reenlisting or extending for _____ ; and
(Initials)

(3) I meet eligibility requirements to receive basic MGIB-SR benefits _____ ; or
(Initials)

d. I am a Lieutenant currently serving in the ARNG and do not have a baccalaureate degree
; and

(Initials)

(1) I meet eligibility requirements to receive basic MGIB-SR benefits _____ ; and
(Initials)

(2) I signed a DA Form 5447-R (Officer Service Agreement) and agree to serve in the
ARNG for 6 years _____ ; or
(Initials)

e. I am a Prior Service soldier and/or qualify for participation in a State Officer Candidate
School (OCS) program currently in phase II or III (completed the first Annual Training Period) or
contracted as an ROTC Simultaneous Membership Program (SMP) Cadet (MS III or IV) in the
ARNG _____ ; and
(Initials)

(1) I am qualified for Basic MGIB Benefits _____ ; and
(Initials)

(2) I am immediately reenlisting or extending my current enlistment to serve a period of
not less than six years in the ARNG as of the date of this contract _____ ; or
(Initials)

f. I completed the Federal Officer Candidate School Program on or after 1 October 1999
; and

(Initials)

(1) I am qualified for Basic MGIB Benefits _____ ; and
(Initials)

(2) I signed a DA Form 5447-R (Officer Service Agreement) and agree to serve in the
ARNG for 6 years _____ ; or
(Initials)

2. Incentive entitlement is based on:

a. Enlisted Personnel:

(1) I am assigned to a high-priority unit _____ authorized by HQDA
for the MGIB-SR Kicker _____ ; and
(Initials) (unit name & UIC)

(2) I am a secondary school diploma graduate or equivalent, or I am currently attending
high school and expect to graduate before I enter the second phase of initial active duty for training
(IADT) under the split-training option _____ ; and
(Initials)

(3) I understand that I must be eligible for MGIB, Chapter 1606 basic benefits or Chapter
30, MGIB basic benefits to become eligible for the MGIB Kicker incentive _____ .
(Initials)

b. Officer Commissioning Programs:

(1) I am participating in a State Officer Candidate School Program in the ARNG
or

(Initials)

(2) I completed the Federal Officer Candidate School Program and accepted a commission
in the ARNG _____ ;or
(Initials)

(3) I am a Prior Service soldier currently contracted as an ROTC SMP cadet (MS III or IV)
in the ARNG _____ ;and
(Initials)

(4) I understand that I must be eligible for MGIB, Chapter 1606 basic benefits or Chapter
30, MGIB basic benefits to become eligible for the MGIB Kicker incentive _____ .
(Initials)

c. I am currently serving in the ARNG as a lieutenant without a baccalaureate degree and I
understand that I must be eligible for MGIB, Chapter 1606 basic benefits or Chapter 30, MGIB basic
benefits to become eligible for the MGIB Kicker incentive _____ .

(Initials)

SECTION IV-OBLIGATION

1. I am enlisting, reenlisting or extending to serve 6 years in the ARNG in a unit and position authorized by HQDA unless excused for the convenience of the Government; to include, normal career progression _____, or
(Initials)
2. I am signing an officer service agreement (DA Form 5447-R) to serve in the ARNG for 6 years and _____
(Initials)
3. I agree to participate satisfactorily in the ARNG according to the conditions prescribed for the MGIB-SR Kicker Incentive Program _____.
(Initials)

SECTION V - ENTITLEMENT

1. I am entitled to the MGIB-SR Kicker incentive Program in the amount of \$_____ per month for each month of basic MGIB-SR, Chapter 1606 or Chapter 30 eligibility remaining for full time enrollment for a maximum of 36 academic months. The Department of Veterans Affairs will adjust this amount and the number of months for less than full-time pursuit of qualifying educational programs _____.
(Initials)
2. I understand MGIB payments are not subject to Federal and State income tax withholdings _____.
(Initials)
3. I understand that my unit commander or the commander's direct representative will initiate procedures to document my eligibility for MGIB-SR, chapter 1606 benefits and the Kicker Incentive. I further understand I cannot receive any portion of the MGIB-SR Kicker until I have received my secondary school diploma or authorized equivalent and completed initial active duty for training or the Officer Basic Course (OBC) unless prior service, and have been awarded a primary military occupational specialty (MOS) that is required for my qualifying position _____.
(Initials)
4. I understand it is my responsibility to attain and retain a completed copy of a Notice of Basic Eligibility (NOBE) for Chapter 1606 benefits from my unit or State MGIB Manager _____.
(Initials)
5. I understand that I will retain the MGIB-SR Kicker incentive if promoted within the specialty or skill career progression path that provided MGIB-SR Kicker eligibility _____.
(Initials)
6. If I voluntarily or involuntarily transfer within or between units of the ARNG or USAR, including the IRR, due to unit transition as described in AR 135-7, paragraph 1-14.1, or upon completion of my six year Kicker obligation, and have not used the maximum 36 academic months of basic MGIB-SR benefits, I will continue to receive the Kicker incentive until basic MGIB-SR are exhausted _____.
(Initials)
7. Soldiers who previously received a Kicker contract and are entering a commissioning program see SECTION X.

SECTION VI - SUSPENSION

I understand that under certain conditions listed below I can be suspended on a one-time basis for a specified period from the Kicker incentive program rather than being terminated. Suspensions are limited to the following conditions:

- a. If I have a temporary overseas residence, missionary obligation, or overseas employment obligation for 3 years or less. Also transfer to the Inactive National Guard or Individual Ready Reserve for personal reasons for up to 1 year. If authorized, eligibility to the MGIB-SR Kicker incentive will be reinstated provided I extend my enlistment for a period equal to the amount of time spent under suspension.
- b. If I voluntarily request reassignment to a new position for any other reason, into a non-High Priority unit (enlisted only) my MGIB-SR Kicker Incentives will be suspended for up to one year. When non-PMOS qualification occurs due to reasons listed above in a., I must become PMOS qualified within 24 months to continue receipt of the MGIB-SR Kicker incentive or benefits will be terminated and recouped.

c. I enter a period of service where favorable personnel actions for adverse reasons on my behalf are suspended (FLAG) entitlement to subsequent MGIB-SR Kicker payments will also be suspended. This does not include maintaining body composition standards or failure to pass the Army Physical Fitness Test (APFT). If otherwise eligible, I will be entitled to receive MGIB-SR Kicker payments (section V) when the suspension has been favorably lifted.

d. MGIB-SR Kicker incentives suspended after the 6-year obligation is served will be restored upon reaffiliation in the SELRES in any position or unit of any component as long as I am entitled to MGIB-SR basic benefits.

e. If I become an Unsatisfactory Participant (9 or more unexcused absences within a one year period, or 1 or more days of unauthorized absence from Annual Training per AR 135-91) at any time during my six year contract my Kicker incentives and basic MGIB-SR benefits will be suspended.

f. If I transfer to the USAR Control Group (ROTC) for the purposes of accepting an Army ROTC scholarship under Title 10, U.S. Code, section 2107, my Kicker incentives are suspended. I must reaffiliate in a Kicker eligible unit/MOS (ARNG) within one year of the end of the ROTC scholarship to maintain eligibility. However, soldiers who were previously eligible for MGIB basic benefits and who become recipients of Guaranteed Reserve Forces Duty Scholarships per 10 USC 2107a, are eligible to continue to receive Kicker incentives.

g. If I become an Active Guard Reserve (AGR) soldier (Title 10 or 32); or a military technician (including temporary technician for more than 179 days, and indefinite technician) when membership is a condition of employment, my Kicker incentives are suspended effective on the date of employment. I have one year to reaffiliate to the ARNG in an eligible unit/MOS to retain eligibility after separating from the AGR or military technician program.

h. Officer Candidate School (OCS) participants only: If I fail to complete the OCS program, my Kicker incentives are suspended and I must complete the six-year obligation _____ .
(Initials)

i. MGIB Kicker benefits are suspended for Simultaneous Membership Program (SMP) Cadets who are voluntary or involuntarily separated from the SMP program and remain in the ARNG _____ .
(Initials)

j. OCS and SMP participants who previously received a Kicker contract as an enlisted member and fail to complete the OCS/SMP program must return to a Kicker eligible unit and complete the terms of the original contract to retain Kicker eligibility _____ .
(Initials)

SECTION VII - TERMINATION

My MGIB-SR Kicker incentive will be terminated should any of the following conditions occur before the fulfillment of my enlistment agreement and obligation:

a. If I fail to participate satisfactorily, my eligibility for the MGIB-SR Kicker (as well as my basic MGIB (Chapter 1606 only)) will be suspended pending a final determination per AR 135-91. If I am declared an unsatisfactory participant per AR 135-91, my eligibility for the MGIB-SR Kicker (as well as my basic MGIB (Chapter 1606 only)) will terminate effective on the date of the ninth AWOL with recoupment action.

b. If I fail to return to an active unit status in a qualifying unit within the authorized period of non-availability, my Kicker incentives will terminate with recoupment action.

c. If I fail to extend my ARNG contracted term of service to compensate for a period of suspension due to unfavorable personnel actions my Kicker incentives will terminate on the date of suspension with recoupment action.

d. If I fail to extend my ARNG contracted term of service to compensate for a period of authorized non-availability, my Kicker incentives will terminate with recoupment action.

e. If I do not complete 6 years in the ARNG unit or MOS designated for Kicker eligibility under the terms of the initial contract, my Kicker incentives will terminate with recoupment action.

f. If I refuse to accept another position (unit or MOS) in the ARNG that was offered and within a reasonable commuting distance of the soldier residence my Kicker incentives will be terminated with recoupment.

g. If I received MGIB-SR Kicker incentives from the ARNG and I voluntarily enter on extended active duty in the Active Army, or if I enlist or accept an appointment in a Regular component or another Reserve component for continued service in the SELRES before completing my six-year obligation in the ARNG, my Kicker incentives will terminate with recoupment.

h. If I am voluntarily or involuntarily separated from the SMP program, I am terminated with recoupment unless I remain in the ARNG.

i. If I am discharged, transferred, or reassigned from the ARNG for one or more of the following reasons, my MGIB-SR Kicker incentives (as well as my basic MGIB (Chapter 1606)) will terminate without recoupment:

(1) If I enter the second phase of alternate (split) training without proof of qualification as a secondary school diploma graduate or authorized equivalent.

(2) If I fail to meet qualifications for membership in the ARNG under law or regulations, to include medical fitness standards.

(3) If I become eligible for separation pay.

(4) If I am already commuting outside the reasonable commuting distance IAW AR 135-91 and I refuse to accept another position in the SELRES that was located at or in close proximity to the unit I had been affiliated with and the position did not require a reduction in grade, my Kicker incentives will terminate.

(5) If I am involuntarily reclassified from a Kicker position to a non-critical unit through unit transition (AR 135-7, paragraph 1-14.1), to another position at the convenience of the government, I must become PMOS qualified within 24 months to continue receipt of Kicker incentives or my Kicker incentives will be terminated. This includes soldiers transferring between the ARNG and the USAR.

j. When all 36 months of MGIB-SR basic benefits are used, my Kicker incentives are exhausted.

k. Upon reaching the 10-year delimiting date, my MGIB-SR Kicker incentives are terminated. If I qualify for an exception to receive benefits beyond the 10-year delimiting period, I must correspond directly with the DVA.

SECTION VIII- STATEMENT OF UNDERSTANDING

I have read and understand each of the statements above and have had my questions satisfactorily answered. I understand the statements above are intended to constitute all promises and agreements, whatsoever, concerning my enlistment for MGIB-SR Kicker incentives.

DATE SIGNED

APPLICANT'S SIGNATURE

SSN

TYPED OR PRINTED NAME AND RANK

MOS _____

KICKER CONTROL # _____

SECTION IX - CERTIFICATION BY SERVICE REPRESENTATION

I certify that I have witnessed the reading and signing of the above agreement and the signature appearing above is that of the applicant. I have verified the applicant meets the eligibility requirements of AR 135-7, and the applicant's unit of assignment or MOS is currently eligible, per HQDA annual policy guidance, for the MGIB-SR Kicker Incentive Program. No other promises were made to the applicant as a condition of entitlement to the MGIB-SR Kicker under the SelRes Incentive Program. I have provided the applicant with a copy of this form.

DATE SIGNED _____ SIGNATURE OF SERVICE REPRESENTATIVE _____

TITLE _____ TYPED OR PRINTED NAME AND RANK _____

SECTION X - COMMISSIONING PROGRAM RESTRICTIONS

- 1. I understand by entering an Officer Commissioning Program (OCS or SMP) that my benefits are increased to a rate of \$_____ per month as a full time student as long as I complete the commissioning program and accept a commission in the ARNG. (Only 36 months worth of MGIB-SR Kicker benefits are authorized regardless of rate changes).
- 2. I understand that if I fail to complete the commissioning program that my MGIB-SR Kicker benefits will return to the previous authorized rate of \$_____ .
- 3. I understand that I may be eligible for an increased rate for MGIB-SR Kicker benefits only twice if enrolled in a commissioning program.
- 4. I understand that I must fulfill my six-year obligation if I fail to complete a commissioning program. If I do not complete my obligation by separating from the ARNG, I am subject to recoupment_____ .
(Initials)

DATE SIGNED _____ APPLICANT'S SIGNATURE _____

DATE SIGNED _____ SIGNATURE OF SERVICE REPRESENTATIVE _____

TITLE _____ TYPED OR PRINTED NAME AND RANK _____
