

# Preparing Your Campus For the Post-9/11 GI Bill

Tuesday, June 23, 2009  
University of Massachusetts Medical School  
Worcester, MA





MASSACHUSETTS  
Department of  
Higher Education

# Agenda

- The State Approving Agency
- The Post-9/11 GI Bill
- Yellow Ribbon Program
- Claims Processing
- Overpayments
- Keys To Success

# The Role of the State Approving Agency

Agency	Role	Contact Information
 <p><b>MASSACHUSETTS</b> Department of Higher Education</p> <p>State Approving Agency</p>	<ul style="list-style-type: none"><li>• approves institutions and programs</li><li>• promotes use of the GI Bill through outreach to veterans and their families</li></ul>	<p>One Ashburton Place, Room 1401 Boston, MA 02108 617-994-6914 <a href="http://www.mass.edu/veterans">www.mass.edu/veterans</a></p>
 <p>U.S. Department of Veterans Affairs</p>	<ul style="list-style-type: none"><li>• administers education programs</li></ul>	<p>1-888-GI-BILL-1 <a href="http://www.gibill.va.gov">www.gibill.va.gov</a></p>

# GI Bill Overview

- Title 38 U.S Code & Code of Regulations
- Existing Beneficiary Chapters
  - Chapter 30 Active Duty
  - Chapter 32 Veterans Education Assistance Program (VEAP)
  - Chapter 35 Survivors & Dependents (DEA)
  - Chapter 1606 Selective Reserve (MGIB-SR)
  - Chapter 1607 Selective Reserve (REAP)
- New Legislation
  - **Chapter 33 Post-9/11 GI Bill (Veterans Education Assistance Act 2008)**

# The Post-9/11 GI Bill

- Broadens the eligibility of the GI Bill education benefit
- Signed into law on June 30, 2008
- Becomes effective on Aug 1, 2009
- Rewards members who served on active duty after September 10, 2001
- Can only be used for an SAA approved program at an Institution of Higher Learning (IHL)

# The Post-9/11 GI Bill

- Extends benefit eligibility to 15 years
  - Beneficiaries receive 36 months of benefit or 48 months if eligible for more than one program
- Consists of three payments
  - Tuition & fees up to highest in state undergraduate level (paid directly to institution)
  - Book stipend up to \$1,000 per year
  - Housing allowance based on the zip code of the institution (must be enrolled more than half-time)
- Buy-in not required
- Transferability provision to dependents
- Length of service establishes maximum benefit

# Chapter 33 Eligibility

<b>Service Requirements (after 9/10/01 an individual must serve an aggregate of)</b>	<b>Payment Tiers Percentage</b>
At least 36 months	100
At least 30 continuous days on active duty (Must be discharged due to service-connected disability)	100
At least 30 months, but less than 36 months	90
At least 24 months, but less than 30 months	80
*At least 18 months, but less than 24 months	70
*At least 12 months, but less than 18 months	60
*At least 06 months, but less than 12 months	50
*At least 90 days, but less than 06 months	40

\*Excludes time in Basic Military Training and/or Skill Training

# Maximum Education Benefit in Massachusetts

- Maximum Tuition & Fees (*paid directly to institution*)

Maximum Tuition Charge per Credit Hour*	Maximum Total Fees per Term*
\$71.50	\$5,939.50

\*Based on 2008-2009 rates for University of Massachusetts Amherst, Engineering

- Monthly housing allowance (BAH) E-5 with dependents based on zip code of where institution is located.
  - Examples - Boston \$2,128.00; Worcester \$1,420.00; Plymouth \$1,676.00
- Books & Supplies:
  - \$41.67 per credit hour up to 24 credits
  - Based on certification enrollments

# Yellow Ribbon Program

- Helps reduce charges that exceed state cap (private IHL, graduate students, non-residents)
- Consists of voluntary matching agreement (dollar for dollar) between IHL and the VA for any portion of remaining charges
- Student must meet 100% eligibility criteria; reflected on his or her C/E
- Limited availability—first come, first serve.

# Yellow Ribbon Program

- Certification enrollment modifications will allow schools to certify students for Yellow Ribbon.
- Contributions can change each academic year.
- Student receives Yellow Ribbon Program contributions as long as:
  - The IHL participates in the program,
  - Student has remaining eligibility, and
  - Student remains in good academic standing.

# Yellow Ribbon Program

- A list of schools participating in the Yellow Ribbon Program is available at VA's Web Site [www.gibill.va.gov](http://www.gibill.va.gov) and will be on the Web-Enabled Approval Management System (WEAMS).
- The list will include specific information on each school's agreement with VA.
- E-mail any questions to: [yellow.ribbon@va.gov](mailto:yellow.ribbon@va.gov)

# Payment Scenario 1

## 100% Eligible – Public IHL (12-18 Credits)

(Tuition & Fee Payment Sent to Institution Per Semester)

<u>Item</u>	<u>Post 9/11 GI Bill Limit</u>
<i>Highest in-state tuition</i>	<i>\$71.50 per credit</i>
<i>Highest in-state fees</i>	<i>\$5,939.50</i>

<b>Example</b>	
Tuition	\$858.00
Fees	\$5,800.00
Total	\$6,658.00
<b>VA Payment</b>	<b>\$6,658.00</b>
Balance	\$0

100% of Housing & book benefit paid to student

# Payment Scenario 2

## 50% Eligible – Public IHL (12-18 Credits)

(Tuition & Fee Payment Sent to Institution Per Semester)

<u>Item</u>	<u>Post 9/11 GI Bill Limit</u>
<i>Highest in-state tuition</i>	<i>\$71.50 per credit</i>
<i>Highest in-state fees</i>	<i>\$5,939.50</i>

<u>Example</u>	
Tuition	\$858.00
Fees	\$5,800.00
Total	\$6,658.00
<b>VA Payment</b>	<b>\$3,329.00</b>
Balance	\$3,329.00

50% of Housing & book benefit paid to student

# Payment Scenario 3

## 100% Eligible – Private IHL (12 Credits)

(Tuition & Fee Payment Sent to Institution Per Semester)

<u>Item</u>	<u>Post 9/11 GI Bill Limit</u>
<i>Highest in-state tuition</i>	<i>\$71.50 per credit</i>
<i>Highest in-state fees</i>	<i>\$5,939.50</i>

<u>Example</u>	
Tuition	\$10,000.00
Fees	\$50.00
Total	\$10,050.00
<b>VA Payment = (12 x \$71.50)+ \$50.00 Fees</b>	<b>\$908.00</b>
Balance	\$9,142.00

100% of Housing & book benefit paid to student

# Payment Scenario 3-A

## 100% Eligible – Private IHL (15 Credits)

(Tuition & Fee Payment Sent to Institution Per Semester)

<u>Item</u>	<u>Post 9/11 GI Bill Limit</u>
<i>Highest in-state tuition</i>	<i>\$71.50 per credit</i>
<i>Highest in-state fees</i>	<i>\$5,939.50</i>

<u>Example</u>	
Tuition	\$10,000.00
Fees	\$50.00
Total	\$10,050.00
<b>VA payment (15 x \$71.50) + \$50.00 Fees</b>	<b>\$1,122.50</b>
Balance	\$8,927.50

100% of Housing & book benefit paid to student

# Payment Scenario 4

## Yellow Ribbon 100% Eligible – Private IHL (12 Credits)

(Tuition & Fee Payment Sent to Institution Per Semester)

<u>Item</u>	<u>Post 9/11 GI Bill Limit</u>
<i>Highest in-state tuition</i>	<i>\$71.50 per credit</i>
<i>Highest in-state fees</i>	<i>\$5,939.50</i>
<u>Example</u>	
Tuition	\$10,000.00
Fees	\$50.00
Total	\$10,050.00
<b>VA Payment</b>	<b>\$908.00</b>
Remaining Balance	\$9142.00
Yellow Ribbon – Institution Contributes 50% of Remainder	\$4,571.00
Yellow Ribbon – VA Match	\$4,571.00
Balance	\$0

100% of Housing & book benefit paid to student

# Claims Processing

1. VA determines eligibility
2. Student enrolls
3. Certifying Official (CO) certifies enrollments
4. VA releases payments
5. CO monitors status



*Change is a process, not an event.*

# Step 1: VA Determines Eligibility

- Veteran must apply to VA for Chapter 33 benefits.
- VA issues C/E to the veteran
  - Name of beneficiary
  - Chapter
  - Eligibility percentage
  - Total number of months
  - Yellow Ribbon Program Eligibility
- Department of Defense determines transferability.

## Step 2: Student Enrolls

- Veteran must be matriculated and enrolled at an approved IHL in an approved program.

## Step 3: Certifying Official Certifies Enrollments

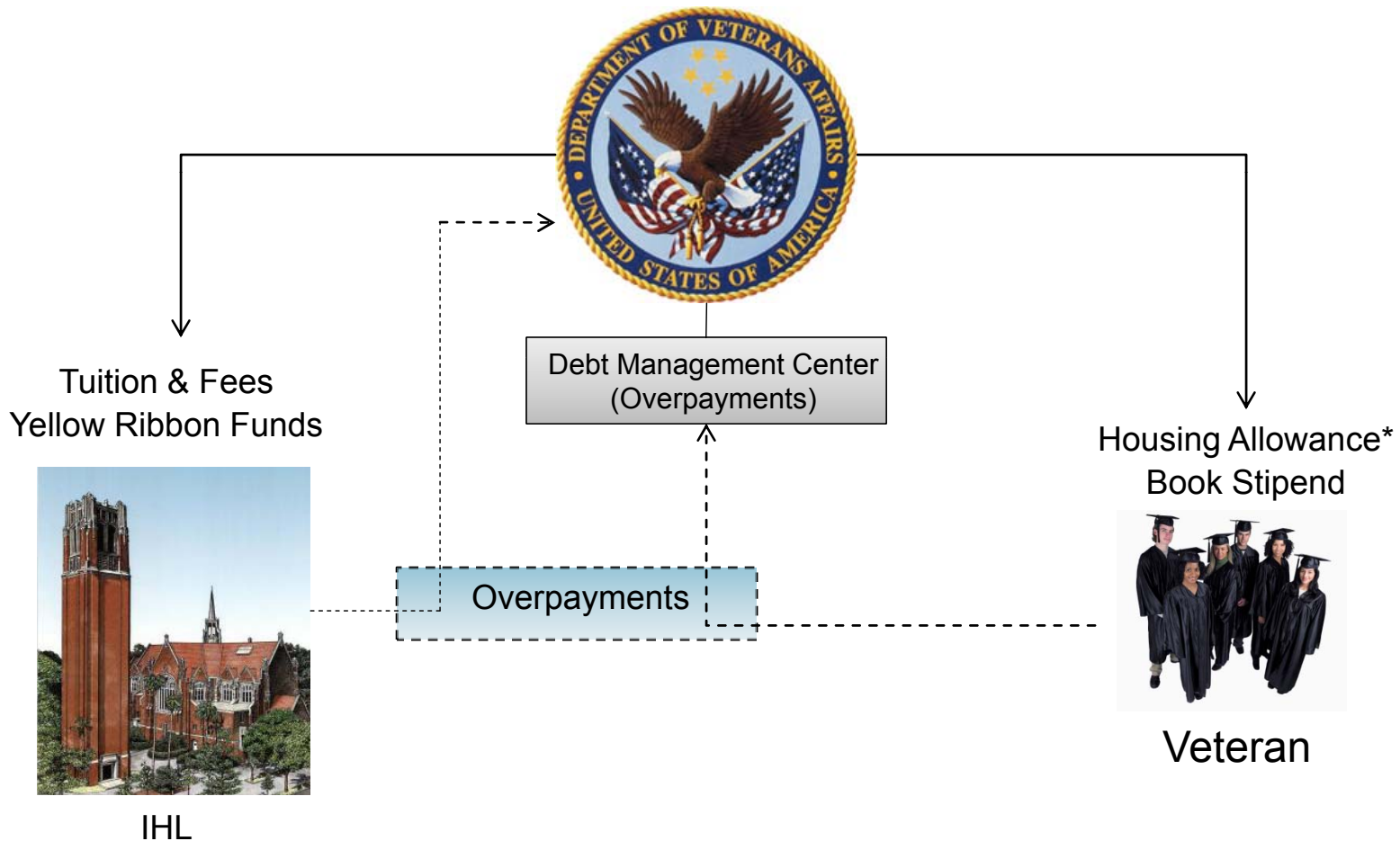
- Begin certifying for Chapter 33 on July 6, 2009
- Certifying Official (CO)
  - Verifies veteran's eligibility
  - Reports:
    - **Actual** tuition and fees charged separately
    - Yellow Ribbon Program contributions
    - Number of credits
- The amount reported to the VA should not be reduced based on incoming sources, such as:
  - State programs (unless any waivers apply before student is billed);
  - Reimbursements to IHL or student;
  - Grants and scholarships;
  - Any Title IV funds; or
  - Other sources that reduce out-of-pocket expenses.

## Step 3: Certifying Official Certifies Enrollments

- **Fees** are any mandatory and required charges (other than tuition, room, and board). Fees include, but are not limited to:
  - health premiums
  - freshman fees
  - graduation fees
  - lab fees
- Fees **do not** include, but are not limited to:
  - Charges for a study abroad course(s) *unless* the course(s) is a mandatory requirement for graduation
  - Late registration fees
  - Meal plans
  - Dorm fees

# Step 4: VA Releases Payments

After CO certifies enrollments and VA processes certifications



\*Paid at end of each month in certified term

# Step 5: CO Monitors Status

- Continuous process during and after the certified term
- CO must report to the VA:
  - increases/decreases in course load and note any corresponding charges, even if bill does not change;
  - Changes during add/drop;
  - Withdrawals; and
  - Non-punitive grades, such as I or W grades.
- Timely reporting, within 30 days of effective date

# Step 5: CO Monitors Status

- When A Student Is Called To Active Duty:
  - For VA purposes, it is the CO's responsibility to notify the VA immediately.
  - IHLs should follow appropriate financial aid and institutional refund policies.

# Overpayments

- Grounds for overpayments:
  - Changes during add/drop period;
  - Non-attendance and withdrawals; and
  - Non-punitive grades.
- VA will determine if an overpayment has occurred.
- VA will determine the amount of overpayment and which party is liable for an overpayment:
  - Student- Course load reduced due to drop, withdrawal, or non-punitive grade
  - IHL- Refund all VA money for non-attendance in any course

# Overpayments

- The VA will prorate overpayments if mitigating circumstances are demonstrated.
- **Mitigating circumstances** are circumstances beyond the individual's control that prevent him or her from continuously pursuing a program of education.
- Examples, but not all-inclusive:
  - A serious illness
  - A serious illness or death in the individual's family
  - A return to active duty

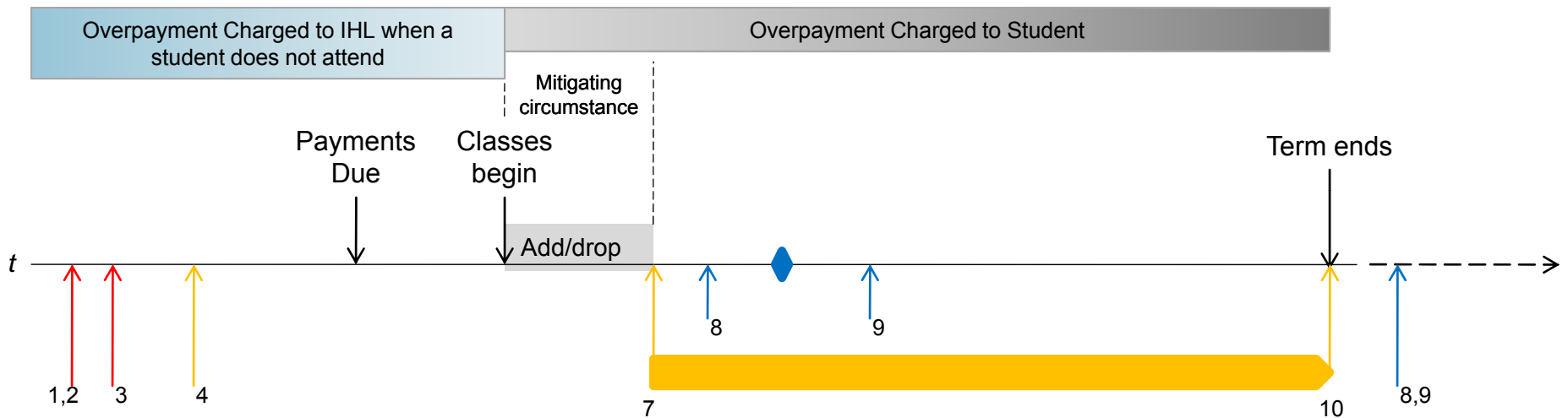
# Keys To Success

- Ensure everyone knows his or her role and responsibilities.
- Don't hesitate to ask questions.
  - VA → payment questions
  - DHE → approval/procedure questions
- Keep up the communication.

## State Approving Agency Contact Information

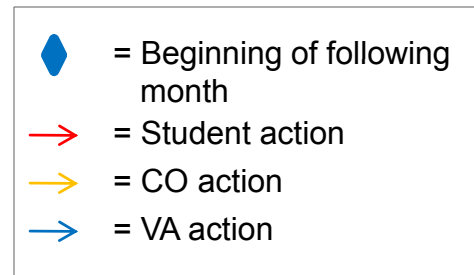
- George O'Connor, *Director for Veterans Education*  
goconnor@bhe.mass.edu  
(617) 994-6955
- Kristen Mooney, *Administrative Assistant for Veterans Education*  
kmooney@bhe.mass.edu  
(617) 994-6914
- John Ebuon, *Program Specialist for Veterans Education*  
jebuen@bhe.mass.edu  
(617) 994-6913

# Timeline



## Action

1. Student applies for eligibility
2. Student receives C/E
3. Student enrolls at IHL
4. CO certifies enrollment(s)
5. VA sends basic payments to IHL
6. VA sends YRP funds to IHL
7. CO notifies VA of status changes, if applicable
8. VA determines overpayment charges
9. VA Debt Management Center begins collecting debt, T + 20 days
10. CO reports non-punitive grades when available



# Certifying Official Responsibilities

- Check for status changes once a month
- Report changes in status within 30 days of effective date
- Report incompletes
- Report withdrawals and other non-punitive grades
- Keep SAA informed of changes to approved programs
- Ensure accuracy of T/F and credit hours
- Ensure veteran is informed that course withdrawals and terminations create overpayments (opposite effect is underpayments created by an 'add')

# Returning Money To VA

- If student does not show up funds received from the VA can be returned via means below:

- *Paper check made payable to “VA Agent Cashier” sent to VA in Buffalo, NY.*

**Buffalo Regional Processing Office  
130 S. Elmwood Ave.  
Buffalo, NY 14202-2478**

- *Un-cashed paper checks can be returned to US Dept of Treasury in Philadelphia, PA.*

**U.S. Department of the Treasury  
Financial Management Service  
PO Box 51318  
Philadelphia, PA 19115-6316**

- *EFT payment with a bank issued R23 ACH return code.*