



DEPARTMENTS OF THE ARMY AND THE AIR FORCE
NATIONAL GUARD BUREAU
1411 JEFFERSON DAVIS HIGHWAY
ARLINGTON, VA 22202-3231

NGB-ARM

05 October 2004

MEMORANDUM FOR SEE DISTRIBUTION

SUBJECT: FY05 ARNG, Montgomery G.I. Bill (MGIB) Kicker (Policy # 05-01a) **Change 1**

1. REFERENCES.

- a. Title 10, United States Code (USC), Mar 01, Chapter 1606, Section 16131.
- b. Department of Defense Instruction (DoDI) 1322.17, 29 Nov 99, Subject: Montgomery GI Bill-Selected Reserve (MGIB-SR).
- c. AR 135-7, ARNG and USAR Incentive Programs, dated 15 April 1996
- d. **Information Paper: "Montgomery GI Bill (MGIB) Kicker Incentive for Reserve Officer Training Corps (ROTC) Simultaneous Membership (SMP) Cadets Dated 29 November 1999".**

2. PURPOSE. This memorandum prescribes the policy and procedures to administer the ARNG MGIB Kicker Program, for the period 1 October 2004 through 30 September 2005 unless sooner rescinded or superseded. Contracts executed under previous MGIB Kicker policies remain in force under their original conditions. The ARNG MGIB Kicker Program is developed based on specific Department of Defense and Department of the Army guidance within a limited budget. Commanders at all levels must ensure the MGIB Kicker Program is administered and managed in accordance with this policy.

3. OVERVIEW. The purpose of the MGIB Kicker is to encourage the enlistment and retention of quality applicants/soldiers into critical skills or units. The MGIB Kicker is an incentive not an entitlement. Applicants/soldiers must apply for and be qualified to receive this incentive. Applicants/soldiers who previously contracted for and received the MGIB Kicker in any Reserve Component (RC) are not eligible to contract for the MGIB Kicker a second time.

4. AUTHORIZED CATEGORIES AND RATES. See paragraph 5 and 6 below for the basic and specific criteria required to qualify.

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| a. Non Prior Service (NPS) | \$200 |
| b. Prior Service (PS) | \$200 |
| c. Current ARNG Soldiers | \$200 |
| d. OCs, WOCs and Simultaneous Members | \$350 |

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5. BASIC CRITERIA. To qualify for the MGIB Kicker, each applicant must be eligible to receive educational assistance under the MGIB-Selected Reserve (MGIB-SR) or the MGIB-Active Duty (MGIB-AD) and meet the following basic criteria:

a. Obligation. Enlist/reenlist and remain in the ARNG for a period of six (6) years or extend their current enlistment in the ARNG to have six (6) years remaining from the date of extension.

b. Position. Be assigned to a valid, Modified Table of Organization and Equipment (MTOE) position vacancy. Table of Distribution and Allowance (TDA) units are not authorized the MGIB Kicker.

c. Education. Possess a high school diploma or its equivalency.

d. Training. Complete the IADT period required for their position. For enlisted personnel this includes Basic Training (BT) and Advanced Individual Training (AIT) or its equivalent. For officers this includes BT and AIT or Officer Basic Course (OBC).

6. SPECIFIC CRITERIA. In addition to the basic criteria, applicants/soldiers must also meet the specific criteria for their MGIB Kicker category as specified below.

a. NPS Applicants, \$200.

(1) Enlist in a critical Military Occupational Skill (MOS) approved by National Guard Bureau (NGB-ARM) in any MTOE unit in the ARNG.

(2) Score a 50 or higher, (Test Score Category I-III A), on the Armed Services Vocational Aptitude Battery (ASVAB).

Note: Glossary NPS applicants are eligible to receive the MGIB Kicker.

b. Prior Service (PS) Applicants, \$200.

(1) Enlist in any MOS in any MTOE unit in the ARNG. Must be qualified in the MOS for which they enlist and be skill level 1 or 2 (Sergeant or below).

(2) Be currently serving on active duty or enlist no later than 30 days after Expiration Term of Service (ETS).

Note: PS applicants who enlist in the ARNG more than 30 days after ETS qualify for the MGIB Kicker only if they have completed their Military Service Obligation (MSO) and have less than 14 years of total military service at the time of enlistment.

c. Current ARNG Soldiers, \$200.

(1) Reenlist/extend in any MOS in any MTOE unit in the ARNG. Must be qualified in the MOS for which they enlist and be skill level 1 or 2 (Sergeant or below).

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(2) Served the past three consecutive years in an active drilling status in the ARNG without a break in service (Inactive National Guard constitutes a break).

(3) Current ARNG Officers in the grade of 1st or 2nd Lieutenant who have not yet obtained a baccalaureate degree are also eligible under this category. These soldiers are not required to have served three consecutive years in the ARNG.

Note: Current ARNG soldiers who meet the criteria listed above may reenlist/extend for the MGIB Kicker at 'anytime' during their enlistment, they do not have to wait until they are within 90 days of their current enlistment.

d. Officer Candidates and Simultaneous Members, \$350. All officer candidates, warrant officer candidates and simultaneous members in any MTOE unit who hold a MOS and meet the following criteria may reenlist/extend for the MGIB Kicker.

(1) Officer Candidate School (OCS). State OCS candidates are eligible to extend their enlistment and sign a MGIB Kicker contract after completing Phase I (the first 2 week training period) of the State OCS Program. Newly appointed Second Lieutenants are eligible to sign a \$350 MGIB Kicker contract up to 90 days after accepting their commission in the ARNG. OCS graduates who apply for the MGIB Kicker after 90 days from course completion will be categorized as a 'Current ARNG Soldier' as identified in paragraph c above.

(2) Warrant Officer Candidate School (WOCS). Warrant Officer Candidates are eligible to extend their enlistment and sign a MGIB Kicker contract after they have been appointed on orders as a Warrant Officer Candidate.

(3) Simultaneous Membership Program (SMP). SMP participants who are enrolled in the Reserve Officer Training Corps (ROTC) Advanced Course (usually MS III or IV), are eligible to sign a MGIB Kicker contract effective the date of the SMP Agreement (NGB Form 594-1) and the ROTC Advanced Course Contract (DA Form 597-3) have been signed, whichever is later.

7. MOS AND UNIT LIST. MGIB Kicker critical MOSs and units are those MOSs and units determined to be critical to the strength and readiness of the ARNG. A list of approved critical MOSs for each state is provided in enclosure 3. To avoid confusion in implementation, this list is identical to the list provided for the ARNG enlistment bonus.

8. CONTRACT REQUIREMENTS.

a. Eligible applicants/soldiers enlisting or re-enlisting/extending for the MGIB Kicker will complete the MGIB Kicker Contract (NGB Form 5435-R, dated 1 Oct 02) on or before the date of their enlistment or reenlistment/extension.

b. MGIB Kicker contracts may NOT be signed after the date of enlistment or reenlistment/extension. Approval authority for exceptions to this policy is the Army Board of Corrections for Military Records (Reference AR 15-185).

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c. Eligible Lieutenants applying for the MGIB Kicker must sign a MGIB Kicker contract and a DA Form 5447-R, Officer Service Agreement (OSA), and agree to serve in the ARNG for a period of six years.

d. Eligible ARNG soldiers with an existing MGIB Kicker contract who enter a commissioning program listed in paragraph 6d, may increase to the \$350 rate by completing Annex K, Supplemental, NGB Form 5435-1-R, dated 1 Oct 02 (using the same control number originally issued). Once commissioned, these officers may continue to receive their MGIB Kicker incentive by signing an OSA equal to the number of months remaining on their original six year obligation that entitled them to the MGIB Kicker incentive. The commander, ESO or incentive manager will cross out the six year portion of the OSA in section I, paragraph 2, write-in the appropriate remaining time requirement, and have the soldier initial.

e. Eligible ARNG soldiers with an existing MGIB Kicker contract who transfer to a different State in a MGIB Kicker eligible position and unit, will use their existing MGIB Kicker contract and control number upon transfer.

9. CONTROL NUMBERS. Each MGIB Kicker contract will be issued a control number by the State MGIB Manager or ESO. The State MGIB Manager or ESO must verify that the position vacancy is available and that the eligibility criteria for the specific MGIB Kicker category has been met. Control numbers for each MGIB Kicker contract will be exactly 11 characters long as indicated below (for example, a control number for a MGIB Kicker contract issued on 031015 in Ohio would read as follows: K03100001OH)

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|---------------------------------|--|
| a. First character. | 'K' for Kicker. |
| b. Second-Fifth characters. | Date signed (YY/MM), i.e. 0310. |
| c. Sixth-Ninth characters. | Four digit sequence number, i.e. 0001. |
| d. Tenth - Eleventh characters. | Two-letter State abbreviation, i.e. OH for Ohio. |

Note: The sequence number will be consecutive beginning with 0001 until the end of the fiscal year.

10. REPORTING REQUIREMENTS. Accurate reporting of MGIB Kicker information is a mandatory requirement of the Army Auditing Agency. To effectively report the MGIB Kicker, each State MGIB Manager or ESO is required to enter the contract information into the Information Management and Reporting Center (iMARC). iMARC is the official education and incentive tracking system for the ARNG and is the mandatory MGIB Kicker management system for all States

11. DATA INPUT REQUIREMENTS. To accurately report the current eligibility of a soldier's MGIB Kicker, State MGIB Managers or ESOs must ensure all MGIB Kicker contract information and status changes are input into their State SIDPERS. The MGIB Kicker fields and their definitions, as described in AR 25-10, SIDPERS Data Element Dictionary, are as follows:

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a. MGIB Kicker Incentive Basis Code: (MGIB-KICKER-INCENT-BASIS-CD). This is the code that represents the contractual basis for the MGIB Kicker incentive. A - Critical specialty or skill duty position, B - Critical Unit, C - Both critical specialty or skill duty position and critical unit. For this policy, A will not be used, B will be used for PS and C will be used for NPS and officer candidates (since they are getting the kicker due to their position and unit).

b. MGIB Kicker Incentive Rate Code: (MGIB-KICKER_INCENT-RATE-CD). The code that represents the monetary level of a MGIB Kicker incentive. RA - \$100, RB - \$200, RC - \$350.

c. MGIB Kicker Incentive Eligibility Status Code: (MGIB-KICKER-INCENT-ELIG-STAT-CD). This code is used to reflect the soldier's current eligibility status. It changes as the soldier's status changes; i.e. to eligible, suspended or terminated.

d. MGIB Kicker Eligibility Date: (MGIB-KICKER-ELIG-DATE). This is the date that the soldier first becomes eligible for the MGIB Kicker incentive.

e. MGIB Kicker Incentive Eligibility Status Effective Date: (MGIB-KICKER-INCENT-ELIG-STAT-EFF-DATE). This date serves as the effective date for soldiers who have a change in their MGIB Kicker Eligibility Status Code. When the soldier's MGIB Kicker incentive eligibility status code changes, the effective date of the new status is placed here. NPS soldiers' eligibility effective date will be the same as coded for basic MGIB benefits in SIDPERS.

f. MGIB Kicker Incentive Obligation Service Begin Date: (MGIB-KICKER-INCENT-OBLG-SVC-BEGIN-DATE). This is the date a service member agreed to serve six years in a designated Selected Reserve critical specialty or skill duty position and/or critical unit.

12. SUSPENSION, TERMINATION AND RECOUPMENT. In accordance with Title 10 USC, Chapter 1606, Section 16135, ARNG soldiers who fail to fulfill the contractual obligation that entitled them to the MGIB kicker will be have a portion of their MGIB kicker incentive recouped. In addition, should any of the following conditions occur before the fulfillment of the soldier's six year obligation, the MGIB Kicker will be suspended or terminated, with or without recoupment as indicated below.

Note: ARNG soldiers who complete the required six-year obligation, stipulated in the MGIB Kicker contract, may transfer to any skill, unit, or RC (in an active drilling status) and retain eligibility for the MGIB Kicker.

a. **Authorized Period of Non-Availability.** Each service member is authorized a one-time period of non-availability up to one year (3 years for a missionary obligation) during their 14 year MGIB-SR benefit period. The MGIB-SR basic benefit and MGIB Kicker incentive will be suspended when a soldier obtains 9 or more unsatisfactory participation periods/unexcused absences of Inactive-Duty Training (IDT) in a one year period or for any period of unexcused absence from Annual Training (AT). Non-availability includes assignment to the Inactive National Guard (ING) or the Individual Ready Reserve (IRR). Soldiers who enter a period of authorized non-availability will be suspended from their MGIB-SR basic benefit and MGIB Kicker incentive. To reestablish eligibility for the MGIB Kicker after a period of non-availability,

the soldier must return to and be qualified in a MGIB Kicker authorized position and/or unit and extend their current enlistment or sign an OSA for the entire period of non-availability. Soldiers who do not return to an authorized critical position and/or unit will have their MGIB-SR basic benefit re-instated but will remain suspended from their MGIB Kicker incentive up to one year until they return to an authorized skill/unit. If the soldier has not returned to an authorized critical position and/or unit within the one-year period, they will be terminated from their MGIB Kicker incentive without recoupment. Soldiers who fail to extend their enlistment or sign an OSA for the entire period of non-availability will be terminated from the MGIB-SR basic and Kicker incentive without recoupment. Soldiers who fail to return to an active drilling status in the selected reserve after an authorized period of non availability will have their MGIB basic and Kicker incentive terminated with recoupment.

b. Unsatisfactory Participation. The MGIB-SR basic benefit and MGIB Kicker incentive will be suspended when a soldier obtains 9 or more unsatisfactory participation periods/unexcused absences of Inactive-Duty Training (IDT) in a one year period or for any period of unexcused absence from Annual Training (AT). Once a final determination has been made and the soldier has been determined an Unsatisfactory Participant (SIDPERS Code 7), the soldier's MGIB-SR basic benefit and MGIB Kicker incentive is terminated with recoupment effective the date of the 9th unsatisfactory participation period/unexcused absence.

c. Involuntary Transfer/Reassignment. ARNG soldiers will retain their MGIB Kicker incentive if involuntarily transferred or re-assigned within or between ARNG units as a direct result of MOS re-classification, transfer to another position or unit at the convenience of the Government or unit inactivation, reorganization, or relocation. When a soldier is offered a new position, it may be offered in a different MOS based on the substitutability rules in DA Pamphlet 611-21, but it may not require a reduction in grade. When a change in MOS for the position is required, the soldier must qualify for, and be awarded as primary, the MOS required for that position within 24 months to retain MGIB Kicker incentive eligibility. Soldiers who fail to become MOS qualified in the new MOS within 24 months or who do not return to a MGIB Kicker authorized MOS and or unit will have their MGIB Kicker incentive terminated without recoupment.

d. Voluntary Transfer. Soldiers who remain in an active drilling status in the ARNG but voluntarily transfer out of their 'contracted' MOS and/or unit that established eligibility for their MGIB Kicker are authorized a one year, one time authorized period of absence. The MGIB Kicker shall be suspended on the date the member departs the position and/or unit; however, eligibility for the basic MGIB benefit will continue. To regain eligibility for the MGIB Kicker incentive, soldiers must return to a valid MGIB Kicker eligible MOS and/or unit on the current fiscal year critical MOS/Unit list. Soldiers who do not return to a MGIB Kicker authorized MOS and/or unit in a MOS qualified (MOSQ) status within one year will be terminated without recoupment.

Note: Soldiers who voluntarily transfer out of their 'contracted' MOS and/or unit that established eligibility for their MGIB Kicker before the completion of BT and/or AIT, will be permitted to transfer to another MGIB Kicker position provided that position is a valid MGIB Kicker eligible MOS and/or unit on the current fiscal year critical MOS/Unit list.

e. Suspension of Favorable Personnel Actions. Suspension of favorable personnel actions for any reason, other than maintaining body composition standards or failure to pass the Army Physical Fitness Test (APFT), is reason for suspension of MGIB-SR basic benefit and MGIB Kicker incentive.

f. Entrance on Active Guard/Reserve (AGR) Status. Soldiers who enter the AGR program will be suspended from both their MGIB basic benefit and MGIB Kicker incentive on the date they become AGR. Soldiers who do not return to a MGIB Kicker authorized MOS and/or unit in a MOS qualified (MOSQ) status within one year of leaving the AGR Program will be terminated from both their MGIB-SR basic benefit and MGIB Kicker incentive without recoupment effective the date they became AGR.

g. Entrance on Military Technician Status. A soldier who accepts a position as a Military Technician where membership in the ARNG is a condition of employment (includes Temporary Technicians over 179 days and Indefinite Technicians), will be suspended from the MGIB Kicker effective the date of employment. Soldiers who leave their Military Technician status may have their MGIB Kicker incentive reinstated if they return to an authorized MOS and/or unit and provided they have any basic MGIB-SR or AD benefits remaining.

h. Entrance on Active Duty. Soldiers who leave the ARNG and voluntarily enter on active duty in a Regular Active Component will be terminated from their MGIB Kicker incentive with recoupment. To be recouped, these soldiers must be coded as 'Failed to Participate Satisfactorily' for failing to complete their required 6 year obligation which entitled them to the MGIB Kicker incentive.

i. Entrance into another Reserve Component (RC). Soldiers who leave the ARNG and voluntarily enter another RC will be terminated from their MGIB Kicker incentive with recoupment. To be recouped, these soldiers must be coded as a 'Failed to Participate Satisfactorily' for failing to complete their required 6 year obligation which entitled them to the MGIB Kicker incentive.

j. OCS/OBC Completion/Failure. Soldiers who complete the OCS Program, accept a commission in the ARNG and complete OBC are eligible to continue receiving their MGIB Kicker incentive at their current rate. Soldiers who have not completed OBC within 24 months of OCS completion will be terminated from their MGIB Kicker incentive without recoupment.

k. Failure to Accept a Commission. Soldiers with a previous MGIB Kicker at a lower rate who complete an ARNG commissioning program and do not accept a commission in the ARNG may continue to receive their MGIB Kicker incentive at their previous rate, if they return in a MOS qualified status to a MGIB Kicker eligible position and/or unit. Once these soldiers accept their commission, they can be reinstated their MGIB Kicker incentive at the higher rate. Soldiers without a previous MGIB Kicker at a lower rate who complete an ARNG commissioning program and do not accept a commission in the ARNG will be suspended from their MGIB Kicker incentive. Once these soldiers accept their commission, they can be reinstated their MGIB Kicker incentive. Soldiers who do not accept their commission within 24 months of completing the program will be terminated from their MGIB Kicker incentive without recoupment.

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l. Failure to Complete OCS/SMP/WOCS Course. Soldiers who fail to complete the OCS/WOCS course and have a previously contracted MGIB Kicker at a lower rate may continue to receive their MGIB Kicker incentive at the lower rate if they return in a MOS qualified status to a MGIB Kicker eligible position and/or unit. Soldiers who return to the OCS/WOCS program within one year may have their \$350 MGIB Kicker reinstated upon re-entrance to the program. Soldiers who fail to complete the OCS/WOCS program who do not return to the program within 1 year will have their \$350 MGIB Kicker incentive terminated without recoupment. SMP cadets who fail to complete the course will have their \$350 MGIB Kicker incentive terminated without recoupment.

m. Direct Commission/Appointment. Soldiers with an existing MGIB Kicker contract who receive a direct commission/appointment in the ARNG may continue to receive their MGIB Kicker incentive at the contracted rate provided they sign an OSA for the remaining portion of their obligation that entitled them to the MGIB Kicker incentive.

n. Dedicated Guard Scholarship Recipients. Soldiers who become a recipient of a Dedicated Guard Scholarship (Title 10 USC, Section 2107) will be suspended from their MGIB-SR basic benefit and Kicker incentive. Benefit may be reinstated after the Scholarship is completed or ROTC is completed. Soldiers who are recipients of the MGIB-Active Duty (MGIB-AD) may continue to receive the Dedicated Guard Scholarship and the MGIB-AD basic benefit but will be suspended from their MGIB Kicker incentive. Benefit may be reinstated after the Scholarship is completed and Bachelor Degree as not been completed.

o. Promotions. Promotions via the Enlisted Promotion System which require the soldier to move out of their MGIB Kicker unit or MOS will not affect the soldiers MGIB Kicker incentive.

p. Interstate Transfers. A soldier who is issued a MGIB Kicker contract in one state, and who completes an interstate transfer, must transfer in a MOS qualified status to a MGIB Kicker authorized position and MGIB Kicker eligible unit in order to retain MGIB Kicker eligibility. Soldiers who transfer to a non-eligible MGIB Kicker unit and/or MOS or who are not MOS qualified will be suspended from their MGIB Kicker incentive. Soldiers who fail to become MOS qualified in a MGIB Kicker eligible unit and/or MOS within 12 months will have their MGIB Kicker incentive terminated without recoupment.

q. Transfers to the USAR. ARNG soldiers entitled to the MGIB Kicker who transfer to the USAR as a result of a unit inactivation, reorganization, or relocation will continue to receive their MGIB Kicker incentive at the rate specified on their MGIB Kicker contract. Transfers to the USAR prior to the completion of the required six-year obligation for any reason other than that specified in this paragraph will result in termination of the MGIB Kicker with recoupment.

13. DUPLICATION OF BENEFITS. Soldiers may combine the MGIB Kicker with other federal benefits subject to the following limitations.

a. ARNG Federal Tuition Assistance (FTA). Soldiers eligible to receive the MGIB-SR or AD may also receive ARNG FTA for the same courses based on the following:

- (1) Soldiers eligible to receive the MGIB-SR must be enrolled at least ½ time.

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(2) Soldiers eligible to receive the MGIB-AD who have contracted for a MGIB Kicker in the ARNG are NOT authorized to receive ARNG FTA simultaneously for the same course. These soldiers may, however, receive ARNG FTA for any course(s) beyond what is considered full-time enrollment by the school.

b. Dedicated Guard Scholarship. Soldiers who are or recipients of a Dedicated Guard Scholarship (Title 10 USC, Section 2107) are not eligible to receive the MGIB-SR basic benefit or MGIB Kicker incentive simultaneously with the scholarship. Soldiers who are recipients of the MGIB-AD and a MGIB Kicker from the ARNG, may not receive the MGIB Kicker incentive simultaneously with the Scholarship.

c. GRFD Scholarship. Soldiers eligible to receive the MGIB Kicker from the ARNG who become recipients of a GRFD Scholarship (Title 10 USC, Section 2107a) are eligible to receive the scholarship, MGIB-SR or AD basic benefits, and the MGIB Kicker concurrently if otherwise qualified.

14. PAYMENTS. The Department of Veterans Affairs (DVA) administers monthly payments for the MGIB Basic and Kicker Programs. Soldiers eligible for the MGIB Kicker will receive their payments in conjunction with their MGIB basic benefit and only as long as they have MGIB basic benefits remaining not to exceed 36 months of full-time benefits. Soldiers attending less than full-time will receive a prorated amount (i.e. a soldier with a \$200 MGIB Kicker attending ½ time will receive \$100/month in MGIB Kicker benefits). All MGIB Kicker contract amounts are valid for the entire term of the contract regardless of future increases or decreases.

15. POINT OF CONTACT. POC is MSG John DeChane, MGIB Manager, DSN 327-9754, 703-607-9754, or Email at: john.dechane@ngb.army.mil.

Encls

1. NGB Form 5435-R
2. NGB Form 5435-1-R Supplemental
3. Critical MOS List

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RORY T. FROEHLICH
COL, EN
Chief, Personnel Programs, Manpower
and Resources Division

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