



Tuition Assistance (TA) and VA Programs (TATU) Lesson Plan



October, 2015 – Version 1.0

Tuition Assistance (TA) and VA Programs (TATU)
Lesson Plan

Tuition Assistance 1.5 hours

Lesson Overview

Purpose of the Lesson:	The purpose of this lesson, as part of continuing education, is to provide students with an understanding of the VA Tuition Assistance (TA) and Tuition Assistance Top-up (TATU) programs.
Prerequisite Training Requirements:	None
Target Audience:	This lesson is designed for: <ul style="list-style-type: none">• VA Claim Examiners• Case Managers• Any VBA employee with a need to understand the TA and TATU programs.
Lesson References:	The following references support the lesson content: <ul style="list-style-type: none">• M22-4:<ul style="list-style-type: none">○ Part 3, Chapter 10○ Part 4, Chapter 3○ Part 5, Chapter 10○ Part 7, Chapter 1○ Part 12, Service Members/Active Duty• Advisories dated:<ul style="list-style-type: none">○ September 12, 2002○ November 15, 2002○ November 21, 2002○ March 5, 2003○ April 2, 2014○ November 26, 2014○ September 4, 2015

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Lesson Objectives:	<p>At the conclusion of this lesson, you will be able to:</p> <ul style="list-style-type: none"> • Using available references, identify the purpose of tuition assistance (TA) and Tuition Assistance Top-up (TATU), with 80% accuracy on the assessment. • Using the available resources, differentiate the relationship between tuition assistance (TA), Tuition Assistance Top-up (TATU), and other education benefits, with 80% accuracy on the assessment. • Using available resources, identify the requirements for a TATU claim and associated entitlements, with 80% accuracy on the assessment.
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Instructor Notes

This lesson defines the purpose, requirements, and entitlements of the TA and TATU programs. This lesson provides students with the background of each program, how the program functions and restrictions, and the eligibility rules for Veterans and their families.

PowerPoint Slides	Instructor Activities
<i>Tuition Assistance (TA) and VA Programs (TATU)</i>	<p>DISPLAY slide 1 "Tuition Assistance (TA) and VA Programs (TATU)"</p> <p>INTRODUCE yourself as the instructor and introduce any fellow instructors.</p> <p>INTRODUCE the lesson.</p>
<p>Overview of Today's Training</p> <p>The purpose of this lesson is to provide information concerning the Tuition Assistance (TA) and Tuition Assistance Top-up (TATU) educational benefit programs.</p> <p>This lesson includes discussions, comprehension checks, and exercises that provide opportunities for the students to practice the knowledge and skills presented in the lesson.</p>	<p>DISPLAY slide 2 "Overview of Today's Training"</p> <p>PROVIDE an overview of the day's schedule.</p> <p>EXPLAIN that students will be learning about TA and TATU today.</p> <p>DISCUSS how the subject fits into the lesson purpose, goals, and importance.</p>

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<p>Introductions (Optional)</p>	<p>If time permits, ASK students to introduce themselves.</p> <p>Student introductions</p> <ul style="list-style-type: none"> • Name • Office location • Time in position with VA
<p>Icebreaker Activity (Optional)</p> <p>Question:</p> <p>What does the term "Tuition Assistance" mean to you?</p>	<p>DISPLAY slide 3 "Icebreaker Activity"</p> <p>ASK the question:</p> <p><i>What does the term "Tuition Assistance" mean to you?"</i></p> <p>ENCOURAGE students to think about their responses.</p> <p>RECORD student responses for review at the end of the lesson.</p> <p>TRANSITION to the next slide to tie the responses into the lesson objectives.</p>
<p>Lesson Objectives</p> <p>At the end of this lesson, you will be able to:</p> <ul style="list-style-type: none"> • Using available references, identify the purpose of tuition assistance (TA) and Tuition Assistance Top-up (TATU), with 80% accuracy on the assessment. • Using the available resources, differentiate the relationship between tuition assistance (TA), Tuition Assistance Top-up (TATU), and other education benefits, with 80% accuracy on the assessment. • Using available resources, identify the requirements for a tuition TATU claim and associated entitlements, with 80% accuracy on the assessment. 	<p>DISPLAY slide 4 "Lesson Objectives"</p> <p>REVIEW the lesson objectives and assure students they will have opportunities to practice what they learn.</p> <p>EMPHASIZE that the post-lesson assessment will align with the content and these objectives.</p>

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<p>Tuition Assistance (TA) Background</p> <p>Tuition Assistance (TA) benefits began in the 1950s, as a way to provide education benefits to Servicemembers on active duty and were:</p> <ul style="list-style-type: none"> • Paid by the military services • Only 75% of cost <p>VA benefits:</p> <ul style="list-style-type: none"> • Originally were only paid Veterans • Could not pay for the same course that TA paid 	<p>DISPLAY slide 5 "Tuition Assistance (TA) Background"</p> <p>EMPHASIZE that TA assistance was part of the military services and was for active duty personnel, where the VA educational benefits were for Veterans.</p> <p>HIGHLIGHT that prior to Public Law 106-398, the services could only pay 75% of the cost of a course, and that the VA could pay any benefits for the same course for which TA was paid.</p>
<p>TA Purpose</p> <p>TA programs offer eligible Army, Navy, Air Force, Marines, Coast Guard, National Guard, and Reserve members' 100% tuition for voluntary educational courses taken during off-duty hours in support of professional and personal self-development goals.</p>	<p>DISPLAY slide 6 "TA Purpose"</p> <p>EMPHASIZE that TA program benefits are typically not restricted to Servicemembers pursuing college degrees, but may also be used by those looking to take the General Educational Development (GED) tests and earn their high school equivalency diploma or other qualified certificate programs.</p>
<p>TA Administration</p> <p>TA benefits are:</p> <ul style="list-style-type: none"> • Typically earned based on service, and do not have to be repaid. • Administered by each branch of service, which provide their own TA Programs and benefits criteria, including: <ul style="list-style-type: none"> – Award amounts – Eligibility – Restrictions – Application process 	<p>DISPLAY slide 7 "TA Administration"</p> <p>POINT OUT that TA program benefits are earned based on service and are not repaid.</p> <p>EXPLAIN that each branch of service administers their own TA program, including criteria, awards, restrictions, and application process.</p> <p>LIST the various branches of service that have a TA program:</p> <ul style="list-style-type: none"> • Army Tuition Assistance Program • Navy Tuition Assistance Program • Air Force Tuition Assistance Program • Marine Corps Tuition Assistance Program • Coast Guard Tuition Assistance Program

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	<ul style="list-style-type: none"> • National Guard Tuition Assistance Program • Reserves Tuition Assistance Program
<p>DoD Revisions</p> <p>The DoD revised the requirements to include the following TA rules:</p> <ul style="list-style-type: none"> • May not be used with Title 10, Chapter 1606, or 1607 for the same courses regardless of training time. • Is payable only to accredited educational institutions that are: <ul style="list-style-type: none"> ○ Recognized by the Department of Education ○ Approved for VA funding 	<p>DISPLAY slide 8 "DoD Revisions"</p> <p>STRESS that TA programs cannot be use with Title 10 funding for the same courses.</p> <p>EXPRESS that TA is payable only to accredited institutions that are recognized by the Department of Education and approved for VA funding.</p>
<p>Comprehension Check</p> <p>Questions:</p> <ol style="list-style-type: none"> 1. What is the purpose of Tuition Assistance (TA) program? 2. How is the program administered? 	<p>DISPLAY slide 9 "Comprehension Check"</p> <p>Ask the students to provide their own answers.</p> <p>Discuss the correct responses to ensure the students understand the information before progressing to slide 11.</p> <p>Responses:</p> <ol style="list-style-type: none"> 1. The TA program offers eligible Army, Navy, Air Force, Marines, Coast Guard, National Guard, and Reserve members' 100% tuition for voluntary educational courses taken off-duty hours. The benefit is earned based on service, and does not have to be repaid. 2. Each branch of service administers its own TA Program and benefits criteria, including award amounts, eligibility, restrictions, and application process.
<p>TATU Purpose</p> <p>The purpose of the Tuition Assistance Top-</p>	<p>DISPLAY slide 10 "TATU Program Purpose"</p> <p>CLARIFY that the TATU program allows the VA to "Top-up" the benefits paid by the</p>

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<p>up (TATU) program is to:</p> <ul style="list-style-type: none"> • Allow the VA to reimburse an individual for all or a portion of the charges for a course or courses that are not reimbursed under certain military education programs. • Prohibit payment for a course already being paid by the Armed Forces. 	<p>military services so that the individual receives full or close to full reimbursement for his or her courses.</p>
<p>Chapter 30 Criteria</p> <p>Under Chapter 30:</p> <ul style="list-style-type: none"> • Full benefits may be received if not on active duty. • Benefits may only be received through the TATU Program if on active duty. • Regular monthly benefits are barred for those courses in which assistance is received. 	<p>Display slide 11 "Chapter 30 Criteria"</p> <p>EXPLAIN Chapter 30 criteria are meant to prevent "double dipping" for the same course or courses.</p>
<p>DoD Changes to the TA Program</p> <p>Based on Do policy, TA is not authorized for classes when individuals are also receiving benefits under Chapter 1606, Chapter 1607, or any other GI Bill program.</p> <p>Two exceptions are Chapter 30 or Chapter 33.</p>	<p>Display slide 12 "DoD Changes to the TA Program"</p> <p>EXPLAIN that as of September 4, 2014, all schools participating in the Tuition Assistance (TA) program signed a Memorandum of Understanding (MoU) stating that they will not certify the same class for both TA and chapter 1606 or 1607.</p>
<p>State Tuition Assistance</p> <p>Claimants using 1606, 1607, or Chapter 32 in receipt of state tuition assistance should also be aware of the following:</p> <ul style="list-style-type: none"> • Many states offer additional tuition assistance benefits. • These benefits are not a duplication of federal funding and are not prohibited while in receipt of most 	<p>DISPLAY slide 13 "State Tuition Assistance"</p> <p>EXPRESS that when processing, evidence of State or Federal assistance will mean the following:</p> <ul style="list-style-type: none"> • State assistance – full benefits may be received. • Federal assistance – monthly benefits are barred for courses in which assistance is received.

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VA benefits.	
<p>Chapter 33 TA – Not Active v. Active Duty</p> <p>When not on Active Duty the:</p> <ul style="list-style-type: none"> • School will reduce tuition and fees reported and submit an enrollment certification. • VA will issue any remaining tuition, fees, and books, and housing. <p>When on Active Duty the:</p> <ul style="list-style-type: none"> • School will reduce tuition and fees reported and submit an enrollment certification. • VA will issue any remaining tuition, fees, and books. • Claimant will submit TATU form and VA will process enrollment, issuing the student’s cost and/or books. 	<p>DISPLAY slide 14 “Chapter 33 TA – Not Active vs. Active Duty”</p> <p>DISCUSS the main difference between active duty and non-active duty claimants concerning Ch. 33.</p> <p>REINFORCE that the active duty applicant can submit a TATU if they wish.</p>
<p>Discussion</p> <p>What are some of the differences between Chapter 30, Chapter 33, 1606, 1607, and State Tuition Assistance that impact payments to the claimant?</p>	<p>DISPLAY slide 15 “Discussion”</p> <p>Ask the students to provide their own answers.</p> <p>DISCUSS the differences to ensure the students understand the information before progressing to slide 16.</p> <p>Chapter 30</p> <ul style="list-style-type: none"> • Benefits may only be received through the Tuition Assistance Top-Up (TATU) Program if on active duty. • Regular monthly Ch30 benefits are barred for those courses in which assistance is received. • Full benefits may be received if not on active duty (i.e., reservist or guard members). <p>Chapter 33</p> <ul style="list-style-type: none"> • School will reduce tuition and fees

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	<p>reported (by the amount the military paid) and submit an enrollment certification.</p> <ul style="list-style-type: none"> VA will issue any remaining tuition and fees and/or books and housing. <p>1606 and 1607</p> <p>DOD no longer authorizes TA for classes for individuals also receiving benefits under chapter 1606, chapter 1607, or any other GI Bill program other than chapter 30 or chapter 33.</p> <p>State Tuition Assistance</p> <ul style="list-style-type: none"> Many states offer additional tuition assistance benefits. These benefits are not a duplication of federal funding and are not prohibited while in receipt of most VA benefits.
<p>TATU and Chapter 30</p> <p>The TATU program was authorized under PL 106-398 and the following rules apply:</p> <ul style="list-style-type: none"> An individual must be eligible for Chapter 30 benefits and also receive some amount of TA. Furthermore, although Reserve and National Guard components offer TA, there is no Top-up provision for Chapters 1606 or 1607 of Title 10, U.S. Code. 	<p>Display slide 16 "TATU and Chapter 30"</p> <p>Discuss TATU and Chapter 30 requirements.</p>
<p>TATU and Chapter 33 Regulation</p> <p>§21.9590 Approved programs of education and courses...</p> <p><i>(5) Be an individual who has taken a course for which the individual received tuition assistance provided under a program administered by the Secretary of a military department under 10 U.S.C. 2007(a) or (c), for which the individual is</i></p>	<p>Display slide 17 "TATU and Chapter 33 Regulation"</p> <p>EXPLAIN that although TATU did not come into existence with Chapter 33, PL 110-252, it was a precursor by providing for reimbursement of a portion not paid by TA under the Post-9/11 GI Bill.</p> <p>Discuss the importance of Chapter 33 and how it did provide for reimbursement of a</p>


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<p><i>requesting educational assistance for the amount of established charges not covered by military tuition assistance. (Authority: 38 U.S.C. 3313, 3323(a), 3689)</i></p>	<p>portion of expenses not paid by the TA program. Tuition assistance is no different than any other financial aid which needs to be deducted, and the school is required to report the "net charges" to the VA.</p>
<p>TA and Chapter 33</p> <p>Because TA is viewed as a form of financial aid intended to cover tuition, the following should be performed:</p> <ul style="list-style-type: none"> • Schools deduct any amounts paid by the military, along with other assistance, when reporting Net Charges under the Post-9/11 GI Bill. • School Certifying Official (SCO) reports enrollment certifications no differently; with the exception of indicating in the remarks that the student is receiving TA on the certification. • Students submit TA forms, which should be verified and processed without receiving an enrollment certification. 	<p>Display slide 18 "TA and Chapter 33"</p> <p>EXPLAIN that when the schools notate that the student is receiving TA, the claim is off-ramped, and the claims processor checks for any duplication of payment.</p>
<p>TATU Approval Requirements</p> <ul style="list-style-type: none"> • If TA is paid towards a course, then TATU benefits can also be paid towards that course. • The school must be approved by VA. • However, there may still be instances where: <ul style="list-style-type: none"> ○ A course is paid under TA and is not an approved VA program. ○ The student is not pursuing a specific program. • If TA has been paid, VA can make up the difference! 	<p>Display slide 19 "TATU Approval Requirements"</p> <p>CLARIFY how students could still be paid under TA when the course is not part of an approved VA program or when the student is not pursuing a specific program.</p> <p>STRESS that changes are expected and to always defer to any additional policy or procedural update.</p>

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<p>Comprehension Check</p> <p>Questions:</p> <ol style="list-style-type: none"> 1. What must a school do when a student has received TA? 2. Under Chapter 33, what occurs when a student submit TA forms? 	<p>Display slide 20 "Comprehension Check"</p> <p>Ask the students to provide their own answers.</p> <p>Answers</p> <p>Question 1:</p> <ul style="list-style-type: none"> • Schools deduct any amounts paid by the military, along with other assistance, when reporting Net Charges under the Post-9/11 GI Bill. • School Certifying Official (SCO) reports enrollment certifications no differently with the exception of indicating remarks that the student is receiving TA on the certification. • Students submit TA Forms, which should be verified and processed without receiving and enrollment certification. <p>Question 2:</p> <p>The TA forms should be verified and processed without the need for an enrollment certification.</p>
<p>TATU and the Montgomery GI Bill</p> <p>Under the Montgomery GI Bill (MGIB):</p> <ul style="list-style-type: none"> • Education benefits may be paid to Servicemembers for the "out of pocket" costs for courses partially paid by TA. • The claimant must be eligible for Chapter 30 and receiving some amount of Federal TA. 	<p>Display slide 21 "TATU and Montgomery GI Bill"</p> <p>INDICATE that the MGIB benefits can be paid for out of pocket costs of courses partially paid by TA.</p> <p>REITERATE claimant must be eligible for Chapter 30 and some amount of Federal TA.</p>
<p>TATU Reimbursements</p> <p>TATU reimburses as follows:</p> <ul style="list-style-type: none"> • 100% of the claimants out of pocket cost, up to the Veteran monthly rate at the applicable training time. 	<p>Display slide 22 "TATU Reimbursements"</p> <p>STRESS that the TATU reimburses up to 100% of out-of-pocket costs, up to monthly rate.</p> <p>IDENTIFY monthly rate to include MGIB</p>

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<ul style="list-style-type: none"> • Monthly rate includes: <ul style="list-style-type: none"> ○ MGIB additional contributions ○ Relevant college fund • TATU benefits are limited to 36 months of enrollment, regardless of the training time and corresponding amount of MGIB benefits used. <p>Before payments are paid, claimants must:</p> <ul style="list-style-type: none"> • Complete and submit a 22-1990 • Be granted benefit eligibility 	<p>additional contributions and relevant college funds.</p> <p>EMPHASIZE that the TATU benefits are limited to 36 months.</p>
<p>Claim Submission Forms</p> <p>Forms required by the VA are:</p> <ul style="list-style-type: none"> • VA form 22-1990 if the claimant has not previously applied for MGIB • TA forms and Enrollment Certification <p>The Veterans Claim Examiner (VCE) will develop for Form 22-1999 upon receipt of the TA Form.</p>	<p>Display slide 23 "Claim Submission Forms"</p> <p>Point out that VA Form 22-1990 is required if the claimant has not previously applied for MGIB benefits.</p> <p>Explain the TA form(s) and an enrollment certification from the school is also needed.</p> <p>Explain that the VCE will develop for a 22-1999 upon receipt of a TA Form.</p>
<p>TA Form Processing</p> 	<p>Display slide 24 "TA Form Processing"</p> <p>STRESS that the VCE is no longer required to process TATU awards based on receipt of the TA authorization form.</p> <p>EXPLAIN that the SCO has been instructed through the SCO Handbook to use the VA Form 22-1999 to certify TA courses for students on active duty.</p> <p>STRESS that when a TA form is received, the VCE should contact SCO and request VA Form 22-1999.</p>

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<p>VA Form 22-1999 Requirements</p> <p>The School Certifying Official (SCO) will complete VA Form 22-1999 with the following information:</p> <ul style="list-style-type: none"> • Only include those classes for which Federal TA is paying for some, but not all, of the tuition and fee charges. • Only report the remaining “out-of-pocket” charges for tuition and fees, or a lesser amount if desired by the Servicemember. • Enter “Top-up” in the Remarks field. <p>Servicemembers are entitled to receive reimbursement for the full “out-of-pocket” charges. This is the amount the SCO will report.</p>	<p>Display slide 25 “VA Form 22-1999”</p> <p>STRESS that SCO will certify for the classes the Federal TA is paying for some, but not all, the tuition and fees.</p>
<p>Entitlements Charges</p> <ul style="list-style-type: none"> ▪ Claimants are charged one month of entitlement when the amount paid equals the full time monthly rate including any MGIB buy-up amount and college fund payment. ▪ Entitlement is pro-rated for lesser payments. ▪ By law, VA cannot pay for classes that began prior to the effective date of the legislation (10-30-00) and ▪ VA cannot pay for classes which ended more than one year prior to the date VA received the request for reimbursement and the formal claim for benefits is established. 	<p>Display slide 26 “Entitlements Changes”</p> <p>STRESS that claimants:</p> <ul style="list-style-type: none"> • Are charged one month of entitlement <ul style="list-style-type: none"> ○ Equals the full time monthly rate, including any MGIB buy up amount and college fund payment ○ Pro-rated for lesser payments • Cannot be paid for classes prior to 10/30/2000 • Cannot be paid for classes that ended one year before VA received the request for reimbursement <p>NOTE M22-4 Part V CH10.27</p>

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<p>Comprehension Check</p> <p>How far back can you pay TATU submitted with an original claim for benefits on October 1, 2015?</p>	<p>DISPLAY slide 27 ""Comprehension Check""</p> <p>Ask the student to respond to the Comprehension Check.</p> <p>Answer: October , 2014</p> <p>QUESTION 1: VA cannot pay for training prior to one year before the date VA receives a request for reimbursement and a formal claim for benefits is established.</p> <p>QUESTION 2: VA cannot pay for classes which ended more than one year prior to the date VA receives a request for reimbursement and a formal claim for benefits is established</p>
<p>Summary</p> <p>You have completed the Tuition Assistance (TA) lesson. You should be able to:</p> <ul style="list-style-type: none"> • Using available references, identify the purpose of tuition assistance (TA) and Tuition Assistance Top-up (TATU), with 80% accuracy on the assessment. • Using the available resources, differentiate the relationship between tuition assistance (TA), Tuition Assistance Top-up (TATU), and other education benefits, with 80% accuracy on the assessment. • Using available resources, identify the requirements for a tuition assistance (TA) claim and associated entitlements, with 80% accuracy on the assessment. 	<p>DISPLAY "Summary" slide 28.</p> <p>REVIEW the information in the day's lesson.</p> <p>REVIEW student responses to the icebreaker.</p>

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Questions?	DISPLAY "Questions?" slide 29 . ASK students if they have any questions about the day's lesson. RESPOND to all questions before tasking students to complete the assessment.
TMS Assessment and Survey <ul style="list-style-type: none">• The assessment and survey have been assigned to you in TMS.• The assessment is comprised of multiple choice questions.• The questions are based on the information you learned today.• The assessment should take approximately 30 minutes.• Be sure to complete both the assessment and the survey in TMS to receive credit for this training.	DISPLAY slide 30 "TMS Assessment and Survey" CONCLUDE the session by explaining the information on the slide.