

Fully Funded Graduate Programs Policy and Procedures

Fiscal Year 2023

(28 June 2022)

Summary of Changes

- Updated FY23 student timeline
- Updated FY23 HRC Career Division Timeline
- Updated School / Payment POCs

Suggested improvements: Users are invited to send comments and suggested improvements on DA Form 2028 (Recommended Changes to Publications and Blank Forms) to Commander, U.S. Army Human Resources Command (AHRC–OPL-C), 1600 Spearhead Division Avenue, Fort Knox, KY 40122 or send DA 2028 via email to usarmy.knox.hrc.mbx.opmd-army-ac@army.mil

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A. Key Highlights

1. This Policy and Procedures document covers the ACS, GrADSO, PB-GSIP and proponent funded/managed program processes.

For Degree Completion Program (DCP), Cooperative Degree Program (CDP), Scholarship/ Fellowship/Internship and Training with Industry (TWI) information and points of contact, please reference the Advanced Education Programs Branch (AEPB) Home Page (Note: This link requires AKO USERID and password login.):
<https://www.hrc.army.mil/Officer/Officer%20Advanced%20Education%20Programs>

2. The Advanced Education Programs Branch (including the ACS Section) accepts hardcopy or electronic correspondence. Electronic correspondence is preferred, however, hard copy correspondence can be mailed to following address:

Mail to: Commander Human Resources Command Attn: AHRC-OPL-C
1600 Spearhead Division Ave
Fort Knox, KY 40122
Email: usarmy.knox.hrc.mbx.opmd-army-acs@army.mil

3. AEPB processes graduate school nomination packets. Once the packet is approved, AEPB will notify the applicable Professional Services Branch (PSB) to request assignment instructions/request for orders (RFO). **NO RFO WILL BE PUBLISHED UNTIL THE PACKET HAS BEEN APPROVED.**

4. Annual ACS cost caps for tuition and fees for FY23 are: **low cost – less than \$28,000; medium cost – less than \$48,000; high cost – less than \$60,000.** This is expressed as an amount including tuition and the mandatory fees covered by the Army for a complete academic year. Academic year is defined as three semesters or the number of term/quarter equivalents (Fall, Spring, Summer, or Spring Summer, Fall, or Summer, Fall and Spring) depending on the start date of the student. Students are required to obtain the detailed, itemized cost of the entire program when they submit their application. Quota allocations in each cost category are provided to each Branch and Functional Area (FA) Manager. Schools requested by the student officer must fit into the cost category of the quota they are filling.

- a) Career Satisfaction Program GrADSO has no cost cap, but student officers are encouraged to seek a tuition agreement to lessen the financial burden to the government. **Officers are required obtain in-state tuition rates where available.**
- b) Performance Based Graduate School Incentive Program (PB-GSIP) Cost Cap is at **\$60,000** per academic year.

5. AEPB pays the tuition and most mandatory fees for students enrolled in fully funded programs. Certain fees will not be paid nor reimbursed and they are the responsibility of the officer, such as application fees, transcripts, health insurance,

registration, parking/transportation, graduation fees, student ID, reservation fees, or books. The AEPB does NOT pay for pre-requisites. If pre-requisites are required, the officer will accomplish them on his/her own, at his/her own cost.

6. Programs of study are annotated and agreed to during the application packet process. The payments to the school are predicated on that agreement as outlined in the Tuition Agreement and the initial DA Form 2125 **required** in the nomination packet. **Any changes to that program of study (including re-arranging courses) or costs require approval by the officer's career manager and AEPB in advance. No pre-requisites, undergraduate courses or other courses not required for the degree program will be paid by the Army.** The Army will not pay for retaking courses for which the officer has not achieved a passing grade.

7. **Weekend programs, On-line courses (to include Hybrid courses, in which some traditional face-to-face "seat time" has been replaced by online learning activities) or attendance at "satellite campus" are not within the intent of AR 621-1 and are not supported by AEPB. "Executive" programs will be closely scrutinized for appropriate academic rigor.**

8. All fully funded programs support attainment of a single degree. Dual degree programs are not supported unless prescribed by special programs such as the Defense Comptroller Program where the awarding of two degrees is integrated into the program of instruction. Requests to participate in an integrated program must be submitted through the career division to AEPB for evaluation prior to enrollment.

9. The length of civilian schooling will vary with the curriculum, but master's degrees will not exceed 21 months of continuous full-time study. Exceptions for programs longer than 21 months will be processed as part of the application process endorsed by the training agency and approved by CG, HRC (AHRC-OPL-C).

10. Key Student Requirements - See Section E

11. **FY23** (October 2023 to September 2024 Timeline)

Student Timeline (Due to the AEPB)

- 1 OCT 22 - **Winter 23** Nomination Packet Deadline for NPS Jan 2023 starts.
- 8 OCT 22 - **Spring 23** Nomination Packet Deadline (AFIT and NPS) (Mar starts)
- 15 OCT 22 - **Spring 23** Nomination Packet Deadline (other than NPS/AFIT)
- 11 MAR 23 - **Summer 23** Nomination Packets Deadline (including NPS/AFIT)
- 29 April 23 - **Fall 23** (AUG-SEP starts) Nomination Packets (Including NPS/AFIT)
- 1 JUL 23 - **Winter 24** (OCT-DEC starts) Nomination Packets Deadline.
- 7 OCT 23 - **Winter 24** Nomination Packet Deadline for NPS Students (JAN starts).
- 14 OCT 23 - **Spring 24** Nomination Packets Deadline (AFIT and NPS) (MAR starts)
- 21 OCT 23 - **Spring 24** Nomination Packet Deadline (other than NPS/AFIT)

Note: Packet submission dates listed here are for the career division's submission to AEPB. Students must submit their packets to the career division

NLT 30 days prior to these dates so the career divisions have sufficient time to process to AEPB to meet suspense.

HRC Career Division Timeline (to include student timeline above)

*18 JAN 23	Quota Usage Intent Due to AEPB
01 FEB 23	National Defense University (NDU) Nominees Due
**18 FEB 23	FY23 ACS Quotas Redistributed
MAR-APR 23	FY23 GrADSO Quota Allocation coordination meetings
MAY-23 JUN 23	Career Divisions input for out-year ACS quota allocations due FY23 by-name GrADSO slating finalized and submitted to Director OPMD for approval.
JUL 23	FY23 ACS Quotas Released to PSB's and other training agencies
JUL 23	The Army Educational Requirements System (AERS) Utilization Tour Validation Meeting
JUL 23	FY23 AEPB Budget Submission
JUL 23	FY23 GrADSO Quota Allocation approved by Director and distributed

*** During the January 2023 Quota Usage Intent Meeting, branches are required to submit a by-name roster of officers that they have programmed for school. All unfilled or un-programmed quotas are retrieved by AEPB at that time for redistribution by the Chief, Leader Development Division (LDD).**

**** Deputies will no longer "trade" or redistribute within their own Career Division.**

B. Advanced Education Programs Overview

The AEPB facilitates the education of approximately 1400 students, Scholars and Fellows in any given school year. The AEPB within the OPMD manages officer participation in the following programs covered by this Policy and Procedures Document through which officers pursue fully funded masters or doctorate (PhD) Degrees:

- Advanced Civil Schooling (ACS)
- Graduate School for Active Duty Service Obligation (GrADSO) (Career Satisfaction Program)
- Performance Based Graduate School Incentive Program (PB-GSIP)
- Degree Completion Program (DCP)
- Cooperative Degree Program (CDP)
- Scholarships/Fellowships/Internships (Non-MEL Producing)
- Senior Service College Fellowships
- Training with Industry (TWI)

For information about participation in DCP, CDP, Scholarships/Fellowships/Internships SSC, or TWI, please see the AEPB web page:
<https://www.hrc.army.mil/Officer/Officer%20Advanced%20Education%20Programs>

Although the AEPB hosts the programs stated above there are other key players

(Training Agencies) involved in the process. Training Agencies per AR 621-1 para 1-6 include Career Branches (Army Acquisition Corps (AAC), Chief of Chaplains, Army Judge Advocate General, Career Divisions of Human Resources Command (basic branches and functional areas), United States Military Academy, Army War College, JCS/OSD, HQDA G3/5/7, and Office of Congressional Legislative Liaison (OCLL), among others.

The AEPB also monitors and assists in the conduct of proponent managed and/or funded programs such as the Advanced Strategic Planning and Policy Program (ASP3) and AFPAK Hands program.

1. Advanced Civil Schooling Program

a) The AEPB is responsible for securing and distributing the Army ACS budget. Budget and manning requirements restrict the number of officers allowed to enter ACS each year. Based on Headquarters, Department of the Army (HQDA) G-3 priorities, budget, career field designation needs and historical data, yearly allocations are developed for all the consumers of ACS educated officers (Training Agencies as defined in AR 621-1).

b) ACS allocations are approved via the ACS quota book by the Director, OPMD, and are normally released in August, but no later than (NLT) 15 September, for the upcoming fiscal year (FY). The AEPB also monitors and assists in the conduct of proponent, such as the Advanced Strategic Planning and Policy Program (ASP3), CASCOM Virginia Commonwealth Supply Chain Management Program, National Defense University, Ft Bragg, and Military Intelligence programs with the National Intelligence University.

c) Once allocations are released, it is then the responsibility of the training agencies (See Section D-1) to select the ACS candidates to fill their quota allocations. Training agencies provide their intent to fill quotas to the Chief of AEPB, LDD, OPMD, HRC no later than 1 JANUARY. Selectees must meet the qualifications outlined in Section D.2. Officers with derogatory information (including NLJ OER) must be approved by the Deputy Director, OPMD. Justification will be provided to AEPB for staffing to the Deputy Director. Officers assigned to OPMD, HRC must be approved for selection to ACS or PB-GSIP by the Deputy Director, OPMD in writing either by e-mail or MFR.

d) Training Agencies will work with their candidate officers to guide their school and program of study selections to meet the requirements of the utilization tour assignment, cost cap limitations and the needs of the Army. **Foreign schools require an exception from the Deputy Chief of Staff (DCS) G-1 and must meet Joint Travel Regulation (JTR) tour length minimums (except FAO). US Schools outside the Continental United States (OCONUS) require an exception from CG, HRC and must meet JTR tour length minimum (except FAO).** Except where programs of study violate this policy document, the AEPB will defer to the training agency for school selection and program of study decisions. Study abroad program guidance is at Section E4.



e) Weekend programs, On-line courses (to include Hybrid courses, in which some traditional face-to-face "seat time" has been replaced by online learning activities) or attendance at "satellite campus" are not within the intent of AR 621-1 and are not supported by AEPB. "Executive" programs will be closely scrutinized for appropriate academic rigor.

f) Dual degree programs will not be supported. There are some special programs (Defense Comptroller Program for example) where the awarding of two degrees is integrated into one program. Requests to participate in an integrated program must be submitted through the career division to AEPB for evaluation.

g) Officers will apply to three desired Continental United States (CONUS) civilian institutions (except FAO) (IAW DA FORM 1618, Section 4, dated DEC 2019), unless otherwise directed by HRC.

h) Nomination packets for officers starting school in the winter (Dec/Jan) are due to AEPB IAW the published schedule. Naval Post Graduate School Packets and Air Force Institute of Technology (AFIT) are due at least 90 days prior to the projected school start date to allow for finalization of acceptance, registration and "Welcome Aboard" packet preparation and distribution. Nomination packets for other schools are due IAW annually published schedule and support the funding obligation timeline (normally 60 days prior to the projected start of school, see timelines on page 7).

i) An ACS nomination packet consists of the following:

(i) DA Form 1618 (Application for Detail as Student Officer at a Civilian Educational Institution or at Training with Industry) - Application for the program and signed ADSO statement.

(ii) DA Form 2125 - Outlining the program of study including courses to be taken for the entire program and itemized by semester.

(iii) Unconditional Letter of Acceptance – From the school.

(iv) Tuition Agreement – From the school laying out costs by semester. Must match the DA Form 2125. Students are required to pursue the lowest possible cost the university can provide.

(v) Transcripts – Undergraduate degree and if applicable other graduate level schooling.

(vi) Officer Record Brief (ORB) – Updated copy from Assignment Branch.

(vii) Waivers and exceptions to policy memorandum requests as required.

(viii) Student Responsibilities Acknowledgment - each item initialed and document signed.

(ix) Student acknowledgement of AERS Utilization.

j) After the officer's nomination has been approved by the Chief, AEPB the officer's Assignment Officer (AO) will request assignment instructions/RFO through the appropriate PSB. The RFO will not be released until approved by Chief, AEPB. The AEPB cannot generate an RFO.

k) Per AR 621-1, the RFO will instruct the student to proceed to their university with a report date of ten days prior to the beginning of class or earliest date required to be present at the university, whichever is earlier. **Requests for exception in excess of 10 days must be endorsed by the training agency, accompanied by an agreement of gainful employment, and submitted through the AEPB to the student detachment commander for final approval.**

l) Upon arrival, students will in-process through the United States Army Student Detachment (USASD), Fort Jackson, South Carolina via their website at: <https://usacimt.tradoc.army.mil/ltb/usasd/in-processing.html>. The student detachment will handle all of the students' administrative support while in school.

m) Students will submit progress reports on a DA Form 2125 IAW AR 621-1 para 5-9b and the ROTC/USAREC training memo IAW AR 621-1 para. 5-11 to the AEPB. The AEPB will accept the DA Form 2125 and ROTC/ USAREC training memos via mail or e-mail (electronic preferred, see Section E).

Mail to: Commander Human Resources Command Attn:
AHRC-OPL-C
1600 Spearhead Division Ave
Fort Knox, KY 40122
Email: usarmy.knox.hrc.mbx.opmd-army-acs@army.mil

n) Students will be instructed to provide a courtesy copy of the DA Form 2125 to their appropriate training agency to ensure they are informed of the student's academic progress. For students required to submit a thesis or dissertation, the title and a short summary must be provided with their final DA Form 2125. Students should be reminded that IAW AR 621-1, they are required to maintain a "B" in every course.

o) Students are funded for the program that was agreed upon between the student, the training agency and Chief, AEPB. Regulation and budget requirements do not facilitate special requests or additional funding.

p) **Changes to completion date, program of study, costs or degree scheme must be approved in advance and in writing by training agency and the Chief, AEPB (see Section E-3).**

q) Effective **01 SEP 2019**, military and civilian schools responsible for issuing DA Form 1059 AERs will electronically complete and digitally sign the new fillable .pdf-f AER, upload the AER in the Evaluation Entry System (EES), and electronically submit the AER for processing to HQDA. Schools that do not have the capability to CAC sign

the document will either ink sign and scan or sign via PDF and submit to the Advanced Education Programs Branch, US Army Human Resources Command for processing.. PhD students are required to submit an annual AER.

r) Failure to confer the degree may result in a referred AER.

s) IAW DOD Instruction 1322.10, every ACS quota is associated with an initial utilization tour. The AERS provides for validated fully funded graduate positions and is monitored by the AERS Program Manager, AEPB. Officers receiving ACS funds are expected to fulfill their contractual agreement to the Army by completing their entire utilization tour per AR 621-108 – *Military Personnel Requirements for Civilian Education* (see Section D-9) and ADSO per AR 350-100 – *Officer Active Duty Service Obligation* (see Section D-10). Any utilization tour curtailment or deferment must be approved by the **Director, OPMD** prior to movement of the officer. Requests for tour credit must be approved by the Chief, LDD prior to movement of the officer. Projected AERS utilization tour assignment information will be provided as part of the nomination packet on the HRC Form 214 (Advances Civil Schooling Nomination Form) by the training agency.

t) Participants incur an ADSO of three days for every one day spent in graduate school per AR 350-100 – *Officer Active Duty Service Obligations*. Upon exiting an ACS program, the AEPB will annotate the officer's record with a projected ADSO. Once the final 1059-1 is provided, the AEPB will update the ADSO to the actual incurred.

u) Per DoD Instruction 1322.10, Training Agencies will track the utilization tour accomplishment.

v) The AEPB will host a FY23 ACS quota meeting for training agencies during May 2023 to support the ACS budget update submission due in July 2023

2 Graduate School for Active Duty Service Obligation

a) The Director, OPMD has published a policy memo to govern the management of the GrADSO population and the timing of their school attendance (Director, OPMD Memorandum, Guidance for Management of CSP GrADSO Officers, 18 Sep 14).

b) Career Satisfaction Program. Selected officers in Year Groups 2006 through 2013 signed a contract for the option of selecting the option to attend graduate in exchange for an extended service obligation, known as the pre-commissioning GrADSO program. These officers incurred an initial ADSO of three years for signing the contract to have the option of attending graduate school which is served consecutively with their Commissioning ADSO. The majority of the officers selected for GrADSO will begin attendance between their 6th and 11th year of service. GrADSO students are not bound by a tuition cap but are strongly encouraged to seek a tuition agreement to lessen the burden to the government.

c) Officers in GrADSO programs are authorized to attend an accredited graduate school **within** the United States and encouraged to study in a discipline that enhances

the competencies required in an expeditionary Army – emphasizing cultural awareness, regional knowledge, foreign language, governance, diplomacy, national security or social sciences that reinforce operational skills. **OCONUS (Alaska and Hawaii) schools require meeting minimum tour length requirements of the JTR and an approval by CG, HRC.** Weekend programs, On-line courses (to include Hybrid courses, in which some traditional face-to-face "seat time" has been replaced by online learning activities) or attendance at "satellite campus" are not authorized. **"Executive" programs will be closely scrutinized for appropriate academic rigor.**

d) Participants incur an ADSO of three days for every one day spent in graduate school per AR 350-100 – *Officer Active Duty Service Obligations*.

e) A GrADSO nomination packet will be provided within the timelines outlined on page 7. A GrADSO nomination packet consists of:

- (i) DA Form 1618 - Application for the program and signed ADSO statement.
- (ii) DA Form 2125 – Outlining the program of study including courses to be taken for the entire program and itemized by semester.
- (iii) Letter of Acceptance – From the school.
- (iv) Tuition Agreement – From the school laying out costs by semester. Must match the DA Form 2125. Students are required to pursue the lowest possible cost the university can provide.
- (v) Transcripts – Undergraduate degree and if applicable other graduate level schooling.
- (vi) Officer ORB – Updated copy from Assignment Branch.
- (vii) Waivers and exceptions to policy memorandum requests as required.
- (viii) Student Responsibilities Acknowledgment - each item initialed and document signed.

3 Performance Based Graduate School Incentive Program (PB-GSIP)

a) The Army Chief of Staff initiated the PB-GSIP program with its first year of execution in 2015.

b) PB-GSIP is a 15-21 month education initiative with the mission of enhancing knowledge in key academic disciplines. The purpose is to invest in our future leaders and develop the strategic thinking capital of tomorrow. The program will allow our "Top Performers" to obtain a fully funded 15-21 month Master's degree. They must apply as a resident student at a U.S. accredited CONUS institution IAW the Academic Year (AY)

20232024 Performance Based Graduate School Incentive Program (PB-GSIP)
Guidance and Quota Allocation memo, in one of the following seven accredited academic disciplines: Business Administration, Economics, History, Security Studies, Public Administration, Public Policy (MPP), and Computer Science.

- c) The cost cap for tuition and fees is **\$60,000** per academic year.
- d) The program is open to Army Competitive Category basic branch key developmental Captains and Majors in Operations, Operations Support and Force Sustainment Career Fields (excluding AG and FI).
- e) Officers are nominated for PB-GSIP by their career divisions from the top 10% of their Cohort with final selection made by the Chief of Staff of the Army.
- f) A PB-GSIP nomination packet will be provided within the timelines outlined on page 7. A PB-GSIP nomination packet consists of:
 - (i) DA Form 1618 - Application for the program and signed ADSO statement.
 - (ii) DA Form 2125 – Outlining the program of study including courses to be taken for the entire program and itemized by semester.
 - (iii) Letter of Acceptance – From the school.
 - (iv) Tuition Agreement – From the school laying out costs by semester. Must match the DA Form 2125. Students are required to pursue the lowest possible cost the university can provide.
 - (v) Transcripts – Undergraduate degree and if applicable other graduate level schooling.
 - (vi) Officer ORB – Updated copy from Assignment Branch.
 - (vii) Waivers and exceptions to policy memorandum requests as required.
 - (viii) Student Responsibilities Acknowledgment- each item initialed and document signed.

4. Proponent Funded and Managed Education Programs

- a) Education initiatives from proponents across the Army require HRC monitoring.
- b) These education initiatives are funded by the proponent or other organization outside of ACS and are administered by those organizations (including paying schools).
- c) All such graduate education initiatives must be approved by the HQDADCS G3/5/7 in conjunction with the DCS, G1 and HRC, LDD. Selection of officers to

participate in these programs must be coordinated with the applicable HRC Career Division and LDD.

d) All administration of school attendance including selection, documentation, programming and budgeting, paying schools, and maintaining audit-ready records are the responsibility of the administering organization.

e) The AEPB is responsible for monitoring these programs and maintaining records to substantiate the incurred ADSO including the DA Form 1618. The administering organization is responsible for maintaining all records required to substantiate the expenditure of Army funds and meet all audit-ready requirements.

f) The administering organization will ensure eligibility IAW AR 621-1. Waivers or exceptions to policy for AR 621-1 requirements must be submitted to the AEPB for processing to the appropriate approval authority.

g) The administering organization will provide the AEPB the following information 60 days prior to the officer's school start date:

(i) Name, rank and last 4 of each officer

(ii) School to be attended

(iii) Degree program

(iv) Start and end dates of program

(v) Signed DA Form 1618

h) The AEPB is responsible for the documentation of ADSOs incurred on the attending officers' record. Administering organizations will ensure that upon completion DA Form 1059-1 and an official copy of transcripts are provided to the AEPB. The AEPB will ensure the officer's personnel records are updated with the ADSO, degree information, and placement of 1059-1 and transcripts into the officer's IPERMS.

5. School / Payment POCs

Any school interface or payment issues will be routed through the appropriate school program manager within AEPB. **Schools are divided alphabetically by the SCHOOL NAME, not the officer's name. Exceptions to Policy for students in school will be routed thru their career branch to the program manager responsible for the officer's school for processing:**

- Ms. Stephanie Dixon, stephanie.l.dixon2.civ@army.mil, is responsible for schools that begin with letters A-H (Abilene Christian University - Howard University);

- Mr. Chad Gingrich, chad.f.gingrich.civ@army.mil, is responsible for schools I-S (Indiana - Stevens Institute of Technology).
- Mr. Jonathan Nelson, jonathan.u.nelson.civ@army.mil, is responsible for schools S-U (Syracuse University - University of Maryland).
- Ms. Jacquelyn Taylor, jacquelyn.d.taylor.civ@army.mil, is responsible for select Universities serving Broadening Opportunities Program and Military Schools (Air Force Institute of Technology (AFIT), Carnegie Mellon University, Georgetown University, George Washington University, Naval Postgraduate School (NPS) and Virginia Commonwealth University).
- Mr. Michael Thomas, michael.d.thomas115.civ@army.mil, is responsible for schools U-Z (University of Massachusetts – Yale University).
- Mr. Daniel Jones, daniel.d.jones12.civ@army.mil, is the AEPB Branch Chief.

C. The Advanced Education Programs Process

1. Guidance for Filling ACS Quotas

a) Filling ACS quotas MUST receive the same level of interest and support as regular requisitions. One key ACS goal for the fully funded graduate program is to provide Army officers the best academic education in the timeliest and most cost effective manner. The most beneficial use of Army fully funded resources is to educate officers who exhibit a potential for future military service, possess a strong academic background (transcripts) and demonstrate a potential to achieve a graduate level education.

b) The Director, OPMD approves quota allocations for each FY. These allocations are based on the AERS, The Army Authorization Document System and other approved education initiatives. NLT 15 JAN of the current FY, training agencies will submit a report to the AEPB that reflects their intent for filling ACS quotas including proposed student names if possible. This report will identify quotas that a training agency knows they will be unable to fill.

c) Any training agency that has a special need for additional quotas should contact the Chief, AEPB NLT December of the current FY. Once the need is validated, the AEPB will include the request when considering where to reallocate unused quotas for the current FY and IAW HQDA G-3 prioritization. Since funding for the year is capped, any additional quotas will come from another training agency (Career Branch or Career Division) that is not able to fill their quotas.

d) In January, the Chief, AEPB will reallocate quotas that have not been identified for use in the current FY. Any training agency that wishes to “swap” with another training agency must inform the AEPB of that intent so that utilization of the quotas can be properly recorded.

e) Training agencies that need an increase for the following FY must provide a decision paper thru CG, HRC, AEPB to HQDA, G-3 (DAMO-TR) for consideration in the upcoming quota development process. ACS quotas are capped at 412 unless exceptions are approved by the HQDA G-3. Justification will include citation of the AERS utilization tour positions which the school quota will support.

2. Eligibility Criteria and Requirements for ACS

Assignment officers carefully screen applicants for ACS to ensure they meet the following criteria:

- ✓ Regular Army or Voluntary Indefinite status at time of application and selection.
- ✓ Not more than a total of 17 years Active Federal Service (AFS) upon entry into the ACS Program. (Note: Warrant officers have different AFS criteria. See AR 621-1, para 6-1(b) for details).
- ✓ Undergraduate degree in an appropriate academic discipline.
- ✓ Completed baccalaureate degree with a minimum grade point average (GPA) of 2.5. If a Soldier holds more than one completed baccalaureate degree, the highest GPA will be considered (waivers may be granted by the Chief, AEPB, on a case by case basis for GPAs).
- ✓ Graduate management admission test (GMAT) or graduate record examination (GRE) score if required for acceptance by the academic institution or as part of the selection and nomination process of the training agency.
- ✓ Acceptance into a graduate program which has **no** prerequisites -- If prerequisites are needed, officers should complete them prior to entering the ACS Program. Prerequisites may be taken using tuition assistance IAW AR 621-5. **ACS will not fund courses that are taken as a prerequisite or taken as a non-degree requirement elective.**
- ✓ Acceptance into a resident graduate program at a main campus. **ACS does not support courses taken at satellite facilities or thru on-line programs (to include Hybrid courses, in which some traditional face-to-face "seat time" has been replaced by online learning activities).** On-line courses may be taken as an exception to policy, but must be an integral part of the academic program of study and **approved in advance.**
- ✓ Demonstrated potential for future military service. Officer must NOT be at risk for promotion to the next higher grade.
- ✓ SECRET clearance (TS SCI for NDIC MSSI program).
- ✓ Qualified for promotion or recently promoted to where ACS attendance will not

place the applicant at risk for promotion to the next higher grade.

- ✓ Branch certification that the applicant has no derogatory information in their file (to include NLJ OER). Approval authority is Deputy Director, OPMD.
- ✓ Career timeline allows for schooling and an initial utilization assignment for a minimum of two years (many training agencies require initial three year utilization).
- ✓ If the prospective student works within OPMD, the Deputy Director must approve the nomination.

3. Eligibility Criteria and Requirements for GrADSO

Career Managers carefully screen applicants for GrADSO to ensure they meet the following criteria:

- ✓ Regular Army or Voluntary Indefinite status at time of application and selection.
- ✓ Cannot have more than a total of 17 years AFS upon entry into the program (waiverable).
- ✓ Have a signed contract or agreement in their Army Military Human Resource Record, year groups 2006-2013
- ✓ Attendance in GrADSO between the 6th and 11th year of commissioned service.
- ✓ Undergraduate degree in an approved academic discipline at a U.S. accredited school.
- ✓ Undergraduate GPA of 2.5 or better.
- ✓ Acceptance into a graduate program which has no prerequisites -- If prerequisites are needed, officers should complete prerequisites prior. Prerequisites may be taken using tuition assistance IAW AR 621-5. GrADSO will not fund courses that are taken as a prerequisite nor taken as a non-degree requirement elective.
- ✓ Demonstrated potential for future military service. Qualified for promotion or recently promoted to where school attendance will not place the applicant at risk for promotion to the next rank. **No derogatory information or flags in file.** Removal of officers from GRADSO has been delegated to the Director, OPMD for approval.

4. Eligibility Criteria and Requirements for PB-GSIP

Career Managers carefully screen applicants for PB-GSIP to ensure they meet the following criteria:

- ✓ Regular Army or Voluntary Indefinite status at time of application and selection.
- ✓ Cannot have more than a total of 17 years AFS upon entry into the program (Waiverable).
- ✓ Basic Branch KD CPT or MAJ in the top 10% of their cohort with demonstrated potential for future military service. (Final approval for selection rests with the CG HRC (reviewed by the Army G1).
- ✓ Career timeline supports 15-21 month degree program.
- ✓ Undergraduate degree in an approved academic discipline at a U.S. accredited school.
- ✓ Undergraduate GPA of 2.5 or better.
- ✓ Acceptance into a graduate program/top tier university IAW the approved 20232024 PB-GSIP guidance memo.

5. Student Nomination Process

a) **Procedure.** Nominees for ACS and GrADSO are selected by training agencies, screened by the Career Divisions and PSB and staffed to the AEPB for final approval.

b) **Responsibilities.**

1) **Training Agencies** specific to ACS (per AR 621-1 para 1-6).

(a) Coordinate with Branch/FA proponents for focus areas of study and recommended schools based on Career Maps found in DA PAM 600-3 and the skills required for the utilization tour position.

(b) Screen nominees to ensure they meet eligibility criteria and requirements for ACS.

(c) Determine nominee's potential for future military service.

(d) Examine the nominee's career timeline to ensure they have enough time to complete the degree and serve a utilization tour (two years - minimum; three years - the norm).

(e) Select nominees to fill quota allocations.

(f) Instruct nominee to submit request for ACS (DA Form 1618) with 3 requested CONUS schools. Per DA REG 621-1, one of those schools must be a tax supported school (normally a "state" school from the officer's state of residence or where in-state tuition rates will apply). One school on DA Form 1618 required for GrADSO.

(g) Send “Student Guidance from Training Agency” to each nominee. Example found in Appendix D.

(h) Communicate with nominee on final school selection and field of study (note that for ACS, the training agency has decision authority for the school and field of study).

(i) Assemble the ACS nomination packet (see Appendix D for detailed requirements).

(j) Submit nomination packet through Career Division Chief to the AEPB.

(k) Publish RFO **ONLY** after the nomination packet is approved and notified by the AEPB.

(l) Manage annual quotas and utilization tour assignments.

2) Advanced Education Programs Branch, Leadership Development Division:

(a) Ensure nominee meets all eligibility criteria and requirements for ACS.

(b) Ensure packet contains all necessary documents.

(c) Apply for nominees attending Syracuse Comptroller Program.

(d) Nominate NDU applicants.

(e) Verify cost category and quota availability for each nomination.

(f) Approve/disapprove school selection, nomination packet and notify Career Division.

(g) Provide welcome letter to selected students.

(h) Provide sponsorship letter to schools.

(i) Develop yearly quotas for Director, OPMD approval and distribute to training agencies.

6. ACS Nomination Packet

a) Electronic submission of nominations are required for all training agencies utilizing the OPMD Tool Kit.

b) The ACS Nomination Packet, IAW AR 621-1 para 6-5, **must** include the following:

i. Nomination Form. **Career Division Responsibility**

ii. DA Form 1618, signed by officer and first field grade commander in their chain of command. This is the signed contract between the officer and the Army, and must be on file before the officer can begin ACS. **Candidate Responsibility**

iii. Letter of acceptance from university to which the officer is being nominated. Do not need letters of acceptance from every university to which the officer applied, only the final approved university. Memoranda from United States Military Academy (USMA) or other training agency will not be accepted as a replacement for the letter of acceptance. **Candidate Responsibility**

iv. Current and accurate ORB. **Automatically attached in the Tool Kit**

v. Complete career timeline. **Assignments Officer Responsibility**

vi. All undergraduate and graduate level transcripts. **Candidate Responsibility**

vii. Initialed Tuition Agreement. Listed by term: number of hours each term/semester, the tuition rate per hour, providing a total for tuition per year and itemized list of mandatory fees, with a per-annual total. Include total required hours for degree. Officer must initial beside tuition statement to denote understanding of maximum authorized tuition. **Candidate Responsibility**

viii. Student Acknowledgement of Responsibilities. An example can be found in Appendix C. **Candidate Responsibility**

ix. Student acknowledgment of AERS Utilization. **Candidate Responsibility**

x. DA Form 2125 outlining the planned program of study (courses to be taken by semester). The only exception to the requirements are for officers to attend NPS, NIU and NDU. **Candidate Responsibility**

xi. If applicable, the following must be included:

i. USMA Data Sheet (for all USMA nominations). **USMA Responsibility**

ii. Request for Waiver (GPA, TIS). If a waiver is required, the workflow must go through the officers HRC Division Chief. **Candidate Responsibility**

c) Incomplete packets will be returned (**SEE ME**) for correction and delay processing.

7. GrADSO Slating process

a) GrADSO officers are slated for attendance in accordance with reference 10 (Director, OPMD Memorandum, and Guidance for Management of CSP GrADSO Officers, 18 Sep 2014).

8. PB-GSIP Slating process

- a) Attendance using the PB-GSIP program will be treated like an assignment. Quotas will be provided to the Career Divisions in August of each year. They will conduct a nomination selection process from basic branch (excluding AG and FI) KD CPTs and MAJs in the top 10% of their cohort.
- b) Nominations will be due to AEPB NLT the End of September.
- c) AEPB will package the nominations (primary and alternates) for decision by the Chief of Staff, Army (CSA) by the end of November.
- d) Officers will be notified by their career division after approval by CSA and will be directed to begin the process of applying to schools.
- e) Each cohort (currently set at 30) will be split between fall and spring starts. Summer starts will not be included.

9. GrADSO/PB-GSIP Nomination packet

Electronic submission of nominations are required for all training agencies utilizing the OPMD Tool Kit.

- a) The GrADSO Nomination Packet, IAW AR 621-1, **must** include the following :
 - i.* Nomination Form. **Career Division Responsibility**
 - ii.* DA Form 1618, signed by officer and first field grade commander in their chain of command. This is the signed contract between the officer and the Army, and must be on file before the officer can begin GrADSO. **Candidate Responsibility**
 - iii.* Letter of acceptance from university to which the officer is being nominated. Do not need letters of acceptance from every university to which the officer applied, only the final approved university. **Candidate Responsibility**
 - iv.* Current and accurate ORB. **Automatically attached in the Tool Kit**
 - v.* Complete career timeline. **Assignments Officer Responsibility**
 - vi.* All undergraduate and graduate level transcripts. **Candidate Responsibility**
 - vii.* Initialed Tuition Agreement. Listed by term: number of hours each term/semester, the tuition rate per hour, providing a total for tuition per year and itemized list of mandatory fees, with a per-annual total. Include total required hours for degree. Officer must initial beside tuition statement to denote understanding of maximum authorized tuition. **Candidate Responsibility**

viii. DA Form 2125 outlining the planned program of study (courses to be taken by semester). **Candidate Responsibility**

ix. Student Acknowledgement of Responsibilities. An example can be found in appendix C. **Candidate Responsibility**

x. If applicable, Request for Waiver or Exception to Policy (GPA, TIS). If a waiver is required, the workflow must go through the officers HRC Division Chief.
Candidate Responsibility

b) Incomplete packets will be returned (**SEE ME**) for correction and delay processing.

10. Naval Postgraduate School (NPS) Application Procedures

a) Army officers need to apply online, with the goal of receiving a conditional acceptance letter. The purpose is to prescreen the officer prior to applying to Army ACS. <http://www.nps.edu/Academics/Admissions/ApplyOnline/ApplyNow.html>

b) Obtaining a conditional acceptance letter in advance of applying to an ACS training agency assists the selection process and expedites the formal NPS admissions process after an officer has been selected by the Army. Officers interested in fully funded education at NPS should provide their training agencies copies of all college transcripts, and a copy of their NPS conditional acceptance letter when submitting their ACS applications.

c) Army officers applying for admission to the Department of National Security Affairs must include GRE scores, taken within five years of the date of application.

For additional questions regarding Admissions procedures please contact NPS.

d) **After You Apply** request official sealed transcripts from **all** schools attended (undergrad/grad). Transcripts should be sent directly to NPS from the school(s) attended to the following address:

Admissions Office
(Official Transcripts)
Naval Postgraduate School
1 University Circle, He-022
Monterey, CA 93943-5100

e) Some institutions deliver transcripts electronically through secure means. If your institution subscribes to one of these programs, the email address for electronic transcripts is admissions@nps.edu

f) If you have previously submitted materials or documents to the NPS Admissions Office, please contact them directly to verify the documents are on file before ordering a new set of documents.

g) U.S. students with degrees from international institutions are required to have their degrees evaluated by a service credentialed by the National Association for Credential Evaluation Services: <http://naces.org>

h) GRE Scores are required for some programs see: <http://www.nps.edu/Academics/Admissions/Programs/Masters.html>

i) PhD requirements are found on: <http://www.nps.edu/Academics/Admissions/Programs/Doctoral.html>

j) **Helpful Web Links:** Academic Catalog: <http://www.nps.edu/Academics/GeneralCatalog/Home.htm>

11. Request for Waivers

a) The following criteria may be waived by the Chief, Advanced Education Programs Branch.

(1) GPA

(2) **Time in service (TIS)**, must be able to complete ADSO.

b) Waivers will be considered on a case by case basis. Decision will be based on the officer's total packet. If a waiver is required, the workflow must go through the officers HRC Division Chief.

12. Request for Exception to Policies (ETP)

a) Per AR 621-1, the following items require a request for ETP which will be processed to the appropriate approval authority by the AEPB:

(1) Changes to academic or program plan including:

(a) Changes to number of hours taken in a given semester/term

(b) Changes to the cost of the academic program

(c) Requests to take an overseas course as part of an academic plan (note: no travel or additional costs will be covered by the Army and courses must be an integral part of a US based academic program).

b) Requests for ETP will be submitted thru the officers Branch/assignment officer to AEPB. If an ETP is required, the workflow must go through the officers HRC Division Chief. Example found in Appendix F.

13. Utilization Tour and Deferrals/ Curtailments

a) Army Educational Requirements System Utilization Tour.

1) Initial tour. The DOD policy (DODi 1322-10) specifies that officers who attend fully or partially funded civilian schooling for 12 months or more will serve an initial utilization tour in positions validated for graduate education. This utilization will be for a minimum of 24-months and will normally occur immediately following such education, but **not later than the second tour.**

2) Subsequent tours. The DOD policy states that officers with an advanced civilian degree will serve as many subsequent AERS utilization assignments as Army requirements and professional development considerations will permit.

b) Request for Deferral/Curtailment of Utilization Assignment.

1) The Director, OPMD is the approval authority for all requests for initial deferral/curtailment from initial AERS utilization assignments, except for officers in the Judge Advocate General's Corps and Chaplain's Corps.

2) Submit requests to Chief, AEPB, HRC (AHRC-OPL-C). Be specific and detailed when explaining justification for deferral/curtailment.

3) Requests will be considered on a case by case basis.

4) Example utilization deferment found in Appendix G.

c) AERS utilization tour credit.

1) The Chief, LDD is the approval authority for all requests for tour credit for initial AERS utilization assignments, except for officers in the Judge Advocate General's Corps and Chaplain's Corps.

14. Submit requests to Chief, Advanced Education Programs Branch, HRC (AHRC-OPL-C). Be specific and detailed when explaining justification why the requested assignment should be considered as an equivalent to an AERS utilization tour position. Example Tour Credit Request Memo found in Appendix H.ACS/PB-GSIP Active Duty Service Obligation (ADSO) and Recoupment

a) References.

1) AR 350-100 (dated 8 August 2007), Officer Active Duty Service Obligations, para. 2-8, 3-3, 3-4 and 4-1.

2) AR 621-1 (dated 11 December 2020), Advanced Education Programs and Requirements for Military Personnel.

b) Active Duty Service Obligation.

1) Officers incur an ADSO of three days for every one day in school. The entire schooling period counts toward the ADSO, to include weekends, holidays, leave taken during school, etc. The officer incurs an ADSO regardless of whether he/she graduates.

2) The AEPB, AERS Program Manager calculates the ADSO from the duration of course dates on the AER and records the start and end date of the ADSO on screen eight in the Officer Record Data (ORD) of the ORB, in TOPMIS II.

3) The ADSO begins the day after the officer leaves school.

4) The ADSO can be waived (see below for further explanation).

c) Recoupment.

1) In order to have the ADSO waived, the officer must submit a waiver at the time of the request for retirement or separation. However, the approving authority may choose to accept recoupment of funds from the officer instead of having them serve out the remaining ADSO. This decision is up to the ASA (M&RA).

2) Recoupment equals the percentage of time remaining in the ADSO times the cost of the education. The AEPB will calculate the recoupment, but the final amount is determined by DFAS IAW US Code Title 10, 2005, DoD instruction 1322.10, AR 621-1, AR 350-100, and AR 37-104-4.

15. *GrADSO for Active Duty Service Obligation, Recoupment and Waiver*

a) Active Duty Service Obligation.

1) Officers who sign the GrADSO contract while they are Cadets (USMA or ROTC) incur a three-year ADSO which runs consecutively (after) with their commissioning ADSO.

2) After they have attended their schooling, they incur an additional ADSO of three days for every one day in school. The entire schooling period counts toward the initial ADSO, to include weekends, holidays, leave taken during school, etc. The officer incurs an ADSO regardless of whether he/she graduates.

3) There is a provision to allow a portion of their post school ADSO to be reduced by the time served between their initial GrADSO ADSO and their attendance at school, but in no case will the post-school ADSO be less than 36 months.

4) The AEPB calculates the ADSO from the duration of course dates on the AER and records the start and end date of the ADSO on screen 8 in the ORD of the ORB, in TOPMIS II. The AERS Program Manager is responsible for calculation of all ACS ADSO.

5) The ADSO begins the day after the officer leaves school.

6) The Post School ADSO cannot be waived (see below for further explanation).

b) Recoupment.

1) The Post School ADSO cannot be waived; however, the Army may choose to accept recoupment of funds instead of having the officer serve out the ADSO. The decision is subject to Army requirements.

2) Recoupment equals the percentage of time remaining in the ADSO times the cost of the education. The AEPB will calculate the recoupment, but the final amount is determined by DFAS IAW US Code Title 10, 2005, DoD instruction 1322.10, AR 621-1, AR 350-100, and AR 37-104-4.

c) Initial (pre-school) ADSO Waivers. Requests for a waiver of the initial ADSO will be processed as a request for time in service waiver as part of the Unqualified Resignation Process as outlined in AR 600-8-24. The approving authority for waivers of the initial GrADSO ADSO is the CG, HRC.

D. Student Oriented Section

1. ACS In-Processing and Student Report Requirements

a) AR 621-1 REGULATION HIGHLIGHTS

- TDY and per diem travel are not authorized. Requests for PTDY travel, with justification, must be submitted 90 days prior to departure date through your training agency and the AEPB office (Para 2-9) on a PTDY RequestForm.

- You are not authorized to audit, take credits that do not apply directly to your degree, or take courses for noncredit without prior approval (AR 621-1 para 5-10). See Section D10 of this document to request approval.

- You must be enrolled full time the entire schooling period to include summer sessions. For most universities, the requirement is 9-12 credits for fall and spring, and 6-9 credits for summer (AR 621-1 para 5-11). Any exceptions must be requested and approved in advance IAW Section D10 of this document. Funding amounts to pay for tuition and fees are tied to the DA Form 2125; do not take more hours than indicated on your DA Form 2125.

- If your school does not have regular summer sessions, you must submit a

proposed program through your training agency for gainful employment during the summer sessions and indicate whether university credit will be given (AR 621-1 para 5-11).

- You are required to attend school full time uninterrupted. Therefore, you are not authorized to attend military courses (ILE, Airborne School, etc.) while you are enrolled in the ACS program. Executive, weekend or on-line degree programs **(to include Hybrid courses, in which some traditional face-to-face "seat time" has been replaced by online learning activities)** are not within the intent of AR621-1.

- You will meet degree requirements as quickly as possible. If requirements can be met in less time than allowed, you will promptly inform your training agency, the ACS office and USASD.

- You will maintain the highest standards of conduct and appearance and will abide by the civilian dress code of the civilian institution (AR 621-1 para 5-12).

- You will devote full time to academic studies. Business activities are restricted in accordance with the Department of Defense Joint Ethics Regulation (DoD 5500.7-R). Professional and other military activities will be voluntary and will not interfere with the student's academic studies. Student teaching or research assistanceships are permitted; however, any compensation afforded by the institution must be applied as a credit to the student's tuition bill.

- Requests for exceptions/extensions/early graduation must be justified in writing, endorsed by your academic advisor and sent thru your training agency to the AEPB (AHRC-OPL-C) at HRC and communicated with the US Army Student Detachment.

BOOK PAYMENTS

There is no stipend to **defray application fees** and offset the cost of books. It is the responsibility of **the individual student** to pay application fees and the costs of books. Do not forward book receipts to AEPB.

b) Summary of in-processing requirements:

(1) Upon arrival, students will in-process through the USASD, Fort Jackson, South Carolina via their web site at: <https://usacimt.tradoc.army.mil/ltb/usasd/in-processing.html> for in-processing requirements

(2) Submit an updated DA Form 2125 to the AEPB and their training agency after arrival at school and at the end of each semester/quarter/term including grad information to verify no changes to program of study. The DA Form 2125 will be submitted to the AEPB prior to the add/drop deadline for the subsequent semester.

(3) Visit the registrar to ensure registration indicates in-state or resident status. Provide copy of orders or other forms necessary.

(4) Visit the bursar's office (Third Party Billing) to confirm receipt of the Army Sponsorship letter. Ensure inclusive dates are correct. If not there, or not correct, contact the AEPB program manager responsible for your school.

(5) All bachelor's and master's degree fully and partially funded students will participate with the nearest U.S. Army Cadet Command ROTC battalion or USAREC battalion one day each month during the academic year.

(6) Changes to completion date, program of study, costs or degree scheme must be approved in writing by training agency, PSB and Chief, AEPB **in advance**.

(7) Submit a DA 1059-1 and official transcript at end of studies to the AEPB.

c) Welcome Letter

The AEPB will provide a welcome letter to each nominated officer. This letter will provide the officer with the basic information needed to in-process and accomplish the initial requirements upon arrival at School.

d) DA Form 2125 (Report to Training Agency)

1) Officers will email a DA Form 2125 to the ACS office at usarmy.knox.hrc.mbx.opmd-army-acs@army.mil and courtesy copy their appropriate training agency after arrival at the school (updating the DA Form 2125 submitted with the nomination packet) and at the end of each academic term to ensure they are kept abreast of academic progress. List previous semester and grades, for grades lower than "B," explain unsatisfactory performance. Officers who receive grades lower than "B" are subject to removal from the program. List upcoming semester and highlight any academic issues. Thesis title and one paragraph summary will be listed in the remarks column on the final DA Form 2125. Tuition is linked to receipt of the DA Form 2125 so do not delay submission. Programs of study are expressed and agreed to during the application packet process. Funding is aligned and the payments to the school are predicated on that agreement as outlined in the DA Form 2125. **Any changes to that program of study or costs require approval in advance**. No pre-requisites or other courses not required for the degree program will be paid by the Army.

2) The Army will not pay for retaking courses where the officer did not achieve a passing grade. AR 621-1 does provide a provision that the Army may not pay for the failed course. In many schools, achieving a C is not a passing grade.

e) ROTC or USAREC Duty

1) *Reference: AR 621-1 (11 December) Para 5-11. Training attendance*

2) All bachelor's and master's degree fully and partially funded students will participate with the nearest U.S. Army Cadet Command ROTC battalion or USAREC battalion one day each month during the academic year. This participation will not

interfere with the student's schooling. Due to the nature of ROTC and USAREC duty and the student's schedule, this day may be on a weekend. Officers assigned to the USMA student detachment will serve their one day per month with the USMA Department of Behavioral Sciences and Leadership.

a. Within 45 days of arrival at school, students will coordinate with the Professor of Military Science (PMS) at the nearest Army ROTC battalion to jointly design a program for that one day per month that best meets the needs of the student and ROTC.

b. If there is no ROTC battalion available on campus or nearby, then the student will contact the nearest USAREC Battalion Commander and jointly design a program that best meets the needs of the student and the Recruiting Command.

c. To obtain contact information for the closest recruiting battalion headquarters, students may contact the local recruiting station or go to <http://www.usarec.army.mil> and click on the "Brigades & Battalions" link.

3) Student participation is intended to provide mentorship, recent technical and tactical input, and raise availability of access to experienced Army personnel who will be telling the Army story. The PMS and USAREC Battalion Commanders will not require students to serve in a direct role as a primary instructor or recruiter. Students assist in support of instruction or recruiting efforts if appropriately qualified. The PMS and USAREC Battalion Commanders will not assign any tasks outside of the one day per month and will not interfere with the student's directed academic program.

4) Students will not be required to incur additional expenses in the conduct of this duty.

5) Students will submit an outline of their program participation in memorandum format with their quarter, semester or term DA Form 2125. The memorandum will state the dates and focus of participation and be signed by the officer and the PMS or USAREC Battalion Commander.

6) Students will not receive evaluations for their participation with ROTC or USAREC. The PMS' and USAREC Battalion Commanders may provide input on the semester program outlines or contact the applicable student detachment for questions, comments, or concerns pertaining to an individual officer.

7) Scope or participation inquiries will be directed to HRC (AHRC-OPL-C), AEPB. Inquiries for student populations will be routed through USASD, Fort Jackson.

8) If the local ROTC or USAREC commands cannot use your service, submit a semester/quarter memorandum in the same format stating that you made contact but the PMS/Recruiting Battalion Commander will not require participation. The memorandum will be signed by the officer, PMS and USAREC Battalion Commander. This will be verified back to USAREC and Cadet Command.

f) DA Form 1059-1 (Academic Evaluation Report)

1) In accordance with **MILPER Message 19-183** the Army is transitioning to an updated version of the Academic Evaluation Report for Civilian Institutions DA 1059-1 (dated MAR 2019) beginning 17JUN 2019. All courses with a graduation date of 1 SEP 2019 or later will utilize the applicable DA Form 1059 AERs, dated MAR 2019. Both forms (NOV 2015 & MAR 2019) are authorized for use through 31 AUG 201

2) Effective **01 SEP 2019**, military and civilian schools responsible for issuing DA Form 1059 AERs will electronically complete and digitally sign the new fillable .pdf-f AER, upload the AER in the Evaluation Entry System (EES), and electronically submit the AER for processing to HQDA. Schools that do not have the capability to CAC sign the document will either ink sign and scan or sign via PDF and submit to the Advanced Education Programs Branch, US Army Human Resources Command for processing.

3) Students are required to one official degree awarding transcript to the AEPB, usarmy.knox.hrc.mbx.opmd-army-acs@army.mil or via mail to: Commander, HRC, ATTN: AHRC-OPL-C, 1600 Spearhead Division Avenue, Fort Knox, KY 40122) NLT 60 days after the conclusion of their education period. Most students leave prior to the university issuing transcripts. Ensure you retain a copy of the AER to prevent reconstruction in the event of loss. Contact the AEPB via e-mail if the AER has not been posted after 90 days from the time your degree awarding transcripts are sent.

4) Upon receipt of degree awarding transcripts, the ACS Technician annotates the discipline and funding code, stamps the AER with an official seal, and signs off as the reviewing official in section III, block 13. To reduce the delay in processing, officers should sign the DA Form 1059-1 before submission. The AEPB also annotates the officer's ADSO in TOPMIS.

5) The AEPB will provide the AER with transcript to the Officer Evaluation Records Branch, which will be processed within 30 days of receipt. **Officer Evaluation Records Branch will not process AERs until they have been annotated, stamped and sealed by the AEPB.**

6) The AER and official degree awarding transcript ***together*** are the only official documents that reconcile the expenditures incurred under the auspices of the fully-funded ACS program should HRC be audited. They are also the only documents that officially authorize the entry of appropriate civil educational level data into the OMPF and subsequently onto the officer's ORB. The transcripts should indicate that the appropriate degree in the applicable curriculum was awarded. If the transcript indicates this but is not official, Career Divisions should contact the respective university and verify the applicable degree was awarded and subsequently reflect this information by annotating the AER with the following:

TYPE OF DEGREE: (MS, MA, Ph.D., etc.)

AWARDED: (Date degree was awarded)

VERIFIED BY: (Name of person at the school)

NAME: (Name of person contacting the school, title and Career Division)

7) Failure to complete the training in the time allotted constitutes an adverse report. AR 621-1 makes no provision for additional time in absentia for a thesis, additional course work or special projects. Students who fail to achieve a degree at the conclusion of their formal period of study or training, who voluntarily withdraw, or who are dis-enrolled for substandard academic performance or misconduct prior to completion of their study must submit an AER IAW AR 621-1, para 5-9(d).

8) Students that exceed the funding cap, drop classes after the refund period, fail to qualify for in-state tuition rates, or receive a non-passing grade are responsible for payment to the university for the class or tuition difference in question. Repeated funding violations are grounds for removal from the program.

9) The officer's Career Division or FA Manager, as the reviewing official, has the authority to annotate Section III of the AER with the comment that the student failed to achieve a degree in the time allotted and refer the AER to the individual for acknowledgment or comment. A copy of the final report **MUST** be forwarded to the AEPB so the officer's education file can be officially closed out. Assignment Officers will ensure a degree has not been annotated on the officer's ORB.

10) Master's students in programs of 24 months or less will receive a single AER upon completion of their study. Doctoral candidates will receive an annual AER. Upon completion of coursework, doctoral candidates will include current transcripts and state the approximate completion date for their dissertation.

11) The AEPB will only accept DA Form 1059-1 dated MAR 2006, reference AR 623-3, dated 14 June 2019 and DA PAM 623-3, dated 27 September 2019, Evaluation Reporting System.

(a) Upon arrival, students will in-process through the USASD, Fort Jackson, South Carolina. Go to their website at <https://usacimt.tradoc.army.mil/lfb/usasd/in-processing.html> for complete in-process instructions.

(b) Submit an updated DA Form 2125 to the AEPB and their training agency after arrival at school and at the end of each semester/quarter/term including grad information to verify no changes to program of study. DA Form 2125 will be submitted to the AEPB prior to the add/drop deadline for the subsequent semester. Visit the registrar to ensure registration indicates in-state or resident status. Provide copy of orders or other forms necessary.

(c) Visit the bursar's office (Third Party Billing) to confirm receipt of the Army Sponsorship letter. Ensure inclusive dates are correct. If not there, or not correct, contact the AEPB.

(d) All bachelor's and master's degree fully and partially funded students will participate with the nearest U.S. Army Cadet Command ROTC battalion or USAREC battalion one day each month during the academic year.

(e) Changes to completion date, program of study, costs or degree scheme must be approved in writing by training agency, PSB and Chief, AEPB **in advance**.

- (f) Submit a DA 1059-1 and official transcript at end of studies to the AEPB.

2. Tuition and Fees

a) General

1) The Army expects ALL officers to participate in reduced tuition programs. Many sponsored programs have existing tuition reduction agreements in place, examples: Harvard Strategist, Joint Chief of Staff and Office of Secretary of Defense Intern Program or individual training agency programs. Students who do not attend an existing reduced tuition agreement program are expected to negotiate tuition reduction on their own. By actively pursuing tuition reduction, officers have the opportunity to attend a more prestigious university at a reduced cost. Officers that secure a tuition reduction pass on additional financial resources to other officers applying for ACS.

2) Current annual cost categories for FY23: low \$0 to \$28,000, medium \$28,001 to \$48,000, and high \$48,001 to \$60,000. **Cost categories are the actual expense for the individual program (tuition and fees) calculated for one complete academic year and reflected on the officer's acceptance/tuition letter.** For example, an officer attending through a low cost category and starting in January (spring semester) 2023 the cost cannot exceed \$28,000 for his/her attendance from January through December (spring, summer and fall). A fall 21 start, would include costs for Fall 21, spring and summer 23 semesters. Be aware that tuition may vary from program to program within a university, that many universities do not include summer sessions or fees in the cost estimate process and that numerous programs are willing to assist with graduate tuition cost.

3) During the student's time in school, they will have two tuition accounts with the university. The first is the student account. The second will be our account with the third party billing office.

(a) The student is responsible for paying fees that are not covered by their program.

(b) Students should not worry about notices about unpaid tuition on their student account unless the university "blocks" the student from registering for classes in the upcoming semester. The Third Party billing office will invoice the AEPB (per the sponsorship letter provided to the school) after the add/drop date. The AEPB cannot process payment to the school until an invoice has been received.

(c) Any payment issues should be brought to the attention of the AEPB program manager responsible for that school.

- Mrs. Jacquelyn Taylor, jacquelyn.d.taylor.civ@army.mil, is responsible for select Universities serving Broadening Opportunities Program and Military Schools: (Air Force Institute of Technology (AFIT), Carnegie Mellon University, Georgetown University, George Washington University, Naval Postgraduate School (NPS) and Virginia Commonwealth University).

- Ms. Stephanie Dixon, stephanie.l.dixon2.civ@army.mil, is responsible for schools that begin with letters A-H (Abilene Christian University-Howard University).

- Mr. Chad Gingrich, chad.f.gingrich.civ@army.mil, is responsible for schools that begin with letters I-S (Indiana - Stevens Institute of Technology).
- Mr. Jonathan Nelson, jonathan.u.nelson.civ@army.mil, is responsible for schools that begin with letters S-U (Syracuse University - University of Maryland).
- Mr. Michael Thomas, michael.d.thomas115.civ@army.mil, is responsible for schools that begin with letters U-Z (University of Massachusetts - Yale University).
- Mr. Daniel Jones, daniel.d.jones12.civ@army.mil, is the AEPB Branch Chief.

b) Guide to Negotiating Tuition Reduction

1) **Tuition Reduction Agreements.** Informal written agreements often referred to as (1) individual tuition agreement, (2) tuition agreement incorporated in the acceptance letter, or (3) Memorandum of Agreement between an Army agency and the academic institution. Informal written agreements may be either broad (apply to all officers attending the university) or narrow (apply to one specific officer) in scope. They may be a one-time agreement or a standing agreement effective for a specific length of time. Because of this flexibility, universities may be willing to offer limited scope agreements, which provide substantial cost savings to the Army. While these agreements are not legally enforceable, HRC is not aware of any case in which a university has intentionally failed to honor an agreement of this nature. Individual tuition agreements or tuition agreements incorporated in the acceptance letters are the most common vehicles for securing special tuition reductions.

2) Methods for Negotiating Agreements

a. Primary: Individual officers may attempt to secure a reduced tuition agreement on their own behalf. This has the advantage of distributing the workload associated with this task but ultimately results in increased total efforts as separate agreements must be negotiated for each officer. The success of this approach is highly dependent upon the individual officer's academic qualifications and the individual's persistence and negotiation skills.

b. Alternate: The program training agency may negotiate the reduced tuition agreements. The training agency may pursue a narrow agreement for an individual student or a broader agreement to cover multiple students over a specific period of time. Example: Specific departments within USMA can engage the respective departments of universities with the goal of developing a portfolio of agreements to achieve the desired level of educational diversity among their rotating faculty. Collective agreements are much more time consuming and normally require the Army to compromise during negotiations.

c) Procedures and Guidelines for Negotiating Informal Written Agreements

1) No Contracts: The single most important point to keep in mind when seeking informal agreements for reduced tuition is that the government cannot be obligated in any way. The agreements cannot make guarantees of attendance or commitment to send a prescribed number of students to a university in exchange for reduced tuition. The tuition agreements do not serve as Army contracts.

2) Bottom Line: Don't be afraid to ask for tuition reduction. Many universities are willing to assist Army officers financially. Start with a department head and not an administrator. Clearly state that the university receives an excellent, experienced, professional student and mentor for younger students and the Army officer receives a high quality education at a reduced rate.

3) Formality: While these agreements are informal and not intended to be legally enforceable contracts, they must be made in writing on university letterhead and be signed by an official empowered to commit the institution. The terms must be stated in a straightforward and unambiguous fashion to preclude honest misinterpretations by either the university or the government. The letter must clearly state the amount to be charged each term for the duration of the degree. The training agency should keep the original and a copy of the agreement must be forwarded to HRC (AHRC-OPL-C) with the ACS nomination packet.

4) Meeting the Cost Category: The Army ACS program distributes school quotas by cost category. The categories reflect FY totals as stated above. The goal of the tuition reduction agreements is to bring the tuition rates of a university, which normally does not fit the budget restraints of a cost category, down to a rate that falls into the ACS authorized category. Reduced tuition agreements must reflect the cost of tuition for each period of schooling, whether semester or quarter and meet the criteria of the ACS cost category. The agreement must also cover the entire period of schooling from start date to graduation date to ensure that the cost of tuition does not alter while the officer attends school.

5) Multiple Year Agreements: Tuition reduction agreements for multiple years, multiple students and multiple disciplines are excellent. However, they must still cover the entire period of schooling for all students under the agreement. If a student's schooling period is past the end date of the initial tuition reduction agreement, then a new agreement must be coordinated to cover the student for the duration of their program.

6) Legal Requirements: While there is no requirement for a legal review of an informal written agreement, it is strongly recommended that those individuals who engage in negotiations on behalf of a training agency first consult with the training agency and local ethics advisor for any special guidance that may apply as a result of unique statutory or policy issues pertaining to said training agency. Officers should clearly express that they are negotiating on their own behalf. If questions of representation are involved, i.e. a university under the impression they are negotiating with the Army, the officer must forward any such written agreements to the Department of the Army (AHRC-OPL-C) for legal review.

7) Terminology: Each university handles their tuition reduction differently. Therefore, they may select to use the following terms: in-state tuition rate, resident tuition rate, tuition reduction, or offset. All of these terms are acceptable for use in the tuition reduction agreements as long as the student does not accept the money directly. All financial discounts should be credited to the student's account and reflected upon the invoice sent to ACS for final billing.

8) Letter Example: The University may state in the acceptance letter the source of the additional funding in excess of current cost category cap if necessary, but it is not required. For example, the university may state that the Russian Studies department will pay the difference between \$21,000 and full tuition. A university/department may refer to its contribution to an officer's tuition as an offset, waiver, tuition reduction, difference, etc.

3) The AEPB requires the terms of the reduced tuition agreement be specified in the acceptance letter or tuition agreement letter from the university to include: (1) the amount charged to the Army for tuition and fees each term, (2) the number of credit hours taken each term, and (3) the total number of required credit hours for degree requirements. An example for an 18 month program where the officer begins school in the fall can be found in Appendix I.

d) Prohibition of Paying Tuition "Out of Pocket"

1) **Students are not authorized to pay any tuition "out of pocket" or make up the difference in tuition to attend a higher cost category university** (This does not include fees and other expenses not covered in AR 621-1, Chapter 6). The officer is responsible for all fees not paid by the Army, i.e. registration, parking, recreation, deposit, enrollment, transcript, cap and gown fees, ID card, book cost, etc. Officers may be held accountable for incompletes, failing grades or failure to remain in compliance with the approved program requirements, i.e. taking courses not required, failing to submit in-state waiver for residency tuition status. The Army cannot allow students to pay for tuition with their own funds or through their own financial arrangements due to financial and legal risks that may be incurred. Specific reasons are as follows:

a. Should the student or financing agent refuse or become unable to pay their share of tuition, the Army could become liable for the unpaid balance.

b. Should the officer not complete his studies or depart the service prior to completing his service obligation, it is legally unclear as to whether the Army would be able to recoup the full amount of the pro rata costs expended on the educational program. The cumulative financial and legal risks accruing from multiple annual agreements of this nature would vastly outweigh the potential mutual benefits of any such financial arrangement.

c. A policy allowing such financial arrangements opens the door to charges of economic discrimination, since only those potential students who possess, or who have access to, the financial means to avail themselves of such an arrangement would be able to profit from it.

2) Master's students choosing to pursue a PhD will not be funded for any PhD associated tuition and fees. Master's students are required to complete their approved master's degree and proceed to their utilization tour. Students that continue on, primarily USMA sponsored students, will not be extended under a master's quota. Students desiring to pursue a PhD must find a training agency for a new ACS quota or

do so at no expense to the Army.

3) Some universities for selected programs require a tuition deposit be paid in advance to hold the students seat. The AEPB **cannot** pay this deposit up front and it will be paid by the student, if unable to get the school to waive it. These are normally credited to the student's tuition account. When the university invoices the AEPB, they must invoice the entire amount of tuition and fees (not discounting the deposit paid by the student). The AEPB will pay the entire amount and the school will then credit/refund the deposit amount to the student. Reservation fees that are not tied to the cost of tuition are the responsibility of the student. Reservation fees are not reimbursed or subsidized by ACS.

e) States Granting Resident Tuition Rates to Service Members

There are many intricacies to in-state tuition qualification. For the most current information refer to the DoD In-State Tuition Page available on the ACS Links page or directly at:

<https://www.hrc.army.mil/TAGD/Army%20Continuing%20Education%20System%20ACES>

3. Changes to Program of Academic Study

a) Changes to the program of study (moving classes around, taking more classes than was listed on your original DA Form 2125, etc.) have a direct impact on the ability of the AEPB to align funding to pay the school. The AEPB obligates funds for each semester based on the original plan. It is updated based on the DA Form 2125 the student submits upon reporting to the school. There are valid reasons for a change in program (course will not be offered when originally planned etc.), but those changes must be submitted to the AEPB **IN ADVANCE** or there is a risk of an Anti-Deficiency Act violation which may result in the student bearing the costs of the change.

b) All requests to change an officer's academic program must be in writing. Training agencies have disapproval authority. The Chief, AEPB is the final approval authority for requests that are approved by the training agency. Examples of common requests to change an officer's academic program are:

- Reduced course load
- Change of end date (extension or curtailment of graduation date)
- Overseas travel
- Retake a course
- Request TDY or PTDY
- Request leave
- Change discipline
- Summer Semester Schedule
- Extend Phase I or II of Ph.D. program
- Change to original academic plan submitted with the ACS nomination packet

- c) All requests will include, at a minimum:
- Justification
 - Statement on how it will affect the officer's graduation date (if none, state so)
 - Cost to the Army due to the change (if none, state so)
 - Officer's signature
 - Written endorsement by the officer's academic advisor
 - Written endorsement by the officer's training agency (Career Branch, Career Divisions of Human Resources Command, United States Military Academy, Professor Army War College, etc.)
 - Written endorsement by the officer's Career Manager/Assignment Officer
- d) Requests must be routed through the officer's training agency to the AEPB (AHRC-OPL-C) and received by the AEPB not later than 90 days prior to the beginning of the term or desired action. For overseas travel, 120 days is required. For changes to graduation dates where the branch is not the training agency, the career branch must also recommend approval/disapproval and CDR, USASD will be informed of the change by the Chief, ACS.

4. Temporary Duty and Permissive Temporary Duty (PTDY)

- a) No money is budgeted for travel in any of our programs. Do not select a degree scheme that requires travel. NO requests for funded TDY will be approved by HRC. You may request funds from your training agency or follow on assignment. Per AR 621-1, paragraph 5-7, Travel: "The CG, HRC, plans and budgets all funds to meet programmed educational requirements (para 2-5). This does not include funds for TDY travel and per diem for fully or partially funded programs."
- b) Students may request travel funding from their training agency or the organization to which they will be assigned if the research or attendance will benefit the training agency or organization. Students may also travel by no cost or PTDY in accordance with AR 600-8-10. The student is responsible for making all travel arrangements.
- c) Students may accept, in certain circumstances, support of travel expenses from a non-federal source (e.g. the university). Contact the Program Manager for your school at least 90 days in advance for instructions on processing of those requests. In most cases, travel support must be done "in-kind" and you may not receive any funds even in reimbursement.
- d) Students will submit CONUS requests for PTDY travel to the appropriate training agency a minimum of 90 days prior to the desired date of departure. Requests will contain justification that the travel is required by the institution. All requests must be endorsed by the student's academic advisor, training agency, and submitted to Commander, HRC, ATTN: AHRC-OPL-C, 1600 Spearhead Division Avenue, Fort Knox, KY 40122 for final approval. Information copies will be sent to

the proper student detachment as shown in AR 621-1 para 7-11.

e) OCONUS Travel requests. Students in AR 621-1 programs are not permitted to travel to hazardous duty areas. Students who desire to travel to approved overseas areas in conjunction with study abroad as a part of their overall academic program may do so as long as the cost of tuition does not exceed the projected costs in the tuition agreement and they receive appropriate academic credit toward their degree. Requests will contain justification that the travel is required by the institution. Study abroad tuition must be billed through the U.S. degree awarding university in accordance with the existing third party sponsorship agreement. Students will travel at their own expense unless funding is provided by their training agency or gaining organization. All requests must be endorsed by the student's academic advisor, training agency and submitted to HRC (AHRC-OPL-C) 120 days before desired date of departure for final approval. The additional requirement allows for approval through HRC (AHRC-OPL-C), travel coordination through the applicable student detachment, passport processing, country clearances, and administrative processing. The student is responsible for making all travel arrangements.

f) Travel Request required information.

(1) Requests for PTDY must include the following:

(a) Name, grade, SSN

(b) Name and location of school

(c) Inclusive dates and number of days of PTDY period

(d) Place of PTDY

(e) Mode of travel

(f) Purpose of PTDY and credits earned (with documentation that it is required)

(g) Detailed list of costs (with documentation, i.e. program, brochure, syllabus)

(h) Endorsement from academic advisor Endorsement from training agency (i.e. your branch, functional area, or USMA--whoever sponsored you)

(j) Security or country clearances, passports, or visas required

(k) Detailed itinerary

5. **Doctorate Degree Time Limits and AER Processing**

a) In accordance with AR 621-1, officers participating in the ACS Program pursuing a doctorate degree are allowed a maximum of up to five years to obtain their degree. An ACS PhD program has, if necessary, two phases:

- Phase I covers the period of time spent on campus for completion of preliminary research, coursework, and comprehensive exams for a maximum of three years (Professor Army War College (PAWC) candidates will only receive two years in residence).

- Phase II is the period of time for completion of doctoral research and completion of a dissertation in conjunction with teaching duties at USMA or duties in another AERS validated assignment for a maximum Phase I and Phase II total of five years.

b) On an exceptional basis, an officer may be granted an extension allowing him/her to remain in the PhD program as a non-resident (full time on campus enrollment will not exceed a three year period), but students must understand that these exceptions will be few. Requests for extension must be submitted in writing through the officer's training agency, career division or functional area manager. If approved, the training agency will be required to use a current year quota to fund the extension. Requests must include:

- An explanation as to why the degree will not be completed by the original completion date
- How the officer expects to complete his degree if given additional time
- The projected date of completion (date dissertation will be approved and graduation date if different than dissertation date)
- The faculty advisor's recommendation with revised and signed DA Form 2125, and an endorsement from USMA, PAWC or training agency
- This information is in addition to those items listed in "**Changes to Program of Academic Study**" in Section D-3 of this SOP. Officers pursuing a master's degree, who have begun a PhD program on their own, may not apply to change their existing master's quota to a PhD quota.

c) Academic Evaluation Report. The AER for Doctoral candidates are required yearly. Upon completion of coursework, PhD candidates will include current transcripts and state the approximate completion date for their dissertation. If the officer continues in an all but dissertation (ABD) status at his/her next assignment (e.g. USMA), the officer will receive OER's for that period of time. Once the degree is complete, the officer will receive another 1059-1 covering the entire program and showing the conferral of degree.

d) The ACS office will only accept DA Form 1059-1 dated MAR 2019, reference AR 623-3, dated 14 June 2019 and DA PAM 623-3, dated 27 September 2019, Evaluation Reporting System.

6. Recommended Thesis/Dissertation Topics and Publication

- a. Strategic Studies Institute U.S. Army War College, Key Strategic Issues List (KSIL), <https://ssi.armywarcollege.edu>

- b. TRADOC, Studies & Analysis Division (S&AD), Requirements Integration Directorate (R), Army Capabilities Integration Center (ARCIC), US Army, COMM: 757.788.5802, DSN: 680.5802 Internet: <http://www.arcic.army.mil/Home/index.aspx>

- c. For students interested in publishing, *Military Review*, <http://usacac.army.mil/CAC2/MilitaryReview/> Managing Editor, (913) 684-9339 or leav-milrevweb@conus.army.mil.

Fully Funded Graduate Programs Policy and Procedures Appendixes

Appendix A References

Publications

1. [AR 621-1, Advanced Education Programs and Requirements for Military Personnel](#) (11 December 2019)
2. [AR 350-100, Officer Active Duty Service Obligations](#) (8 August 2007)
3. [AR 621-7, Army Fellowships and Scholarships](#) (8 August 1997)
4. [AR 621-108, Military Personnel Requirements for Civilian Education](#) (26 March 2007)
5. [AR 621-5, Army Continuing Education System](#) (11 July 2006)
6. AR 623-3, Evaluation Reporting System (14 June 2019)
7. DA PAM 623-3, Evaluation Reporting System (27 September 2019)
8. Department of Defense (DoD) Instruction 1322.10, Policy on Graduate Education for Military Officers (29 April 2008)
9. DoD Instruction 1322.06, Fellowships, Scholarships, Training with Industry(TWI) and Grants for DoD Personnel (15 November 2007)
10. Director Officer Personnel Management Directorate (OPMD) Memorandum, Guidance for Management of Career Satisfaction Program (CSP) Graduate School for Active Duty Service Obligation (GrADSO) Officers, 18 Sep 2014

Appendix B Forms

DA Form 1618 - Application for Detail as Student Officer at a Civilian Educational Institution or at Training with Industry. (Cited in para 3–4.)

DA Form 2125 - Report to Training Agency. (Cited in paras 2–11, 2–14, 3–6, 4–6, and 5–6.)

DA Form 1059–1 - Civilian Institution Academic Evaluation Report. DA Form 1059-1 is available at: http://www.army.mil/usapa/eforms/pdf/A1059_1.PDF

Student Acknowledgement of Responsibilities – Example in Appendix C

Appendix C

Example of Student Acknowledgement of Responsibilities

MEMORANDUM FOR RECORD

SUBJECT: Student Acknowledgment of Responsibilities

Reference:

- a. Army Regulation 621-1, Advanced Education Programs and Requirements for Military Personnel, 11 December 2019
- b. Advanced Education Programs Branch (AEPB) Policy and Procedures Manual, FY 22

I acknowledge the following responsibilities (initials at each):

_____ I have read and understand the AEPB Policy and Procedures Manual especially Section E – Student Oriented Section.

_____ I understand that immediately upon my arrival at my university/college, I will contact the Third Party Billing office with the school's bursar's office to ensure that they have received the sponsorship letter from AEPB and that the inclusive dates are correct. If not, I will contact the AEPB Program Manager (PM) responsible for my school.

_____ I understand that within 45 days, I will contact the local ROTC Professor of Military Science (PMS) to arrange for my working with them 1 day each month, conduct of APFT/HT/WT checks and gainful employment during school breaks. If there is no ROTC detachment locally, I will contact the nearest Recruiting Battalion Commander. (This does not apply to FLEP or PhD students)

_____ I understand that upon arrival at my school, I will contact my academic advisor and update my DA Form 2125. I will provide that DA2125 to the Program Manager responsible for my school within 30 days.

_____ I will provide a DA Form 2125 with grades following each semester/term/quarter to the PM responsible for my school. I understand that failure to submit the DA Form 2125 will affect the timing of payment to my school and may cause disruption of my program of study.

_____ I understand that any changes to my program of study to include enrolling in online courses must be approved in advance by AEPB. Failure to obtain prior approval may result in my being financially responsible for any differences in tuition. Changes will be submitted through the PM responsible for my school.

_____ I understand the Army's education programs does not fund travel. Requests for Permissive TDY travel, with justification, must be submitted 90 days prior to departure date (120 if OCONUS) through my training agency to the AEPB office on a PTDY Request Form.

_____ I understand that I will provide updated contact information (telephone numbers and email addresses) to the Program Manager responsible for my school upon acceptance into an ACS program and arrival at school.

_____ I understand all ACS personnel will routinely check their military email accounts on a weekly basis for messages from HRC and/or the US Army Student Detachment.

Student Name _____

Signature _____

Date _____

Appendix D

Example of Acknowledgement of AERS Utilization

OFFICE SYMBOL

1 August 2023

MEMORANDUM FOR RECORD

SUBJECT: AERS Utilization Verification

1. I acknowledge that an AERS Utilization is required IAW AR 621-108 Military Personnel Requirements for Civilian Education.
2. Point of contact for this acknowledgment is CPT John Jones, (555)555-5555, at john.d.jones.mil@army.mil.

JOHN D. JONES
CPT, IN
Commanding

Appendix E

Example of Student Guidance from Training Agency:

Dear <ACS Nominee>,

1. You are being nominated for the Army's Advanced Civil Schooling (ACS) program to pursue a <Masters>/<PhD> degree in <specify exact discipline>. This memorandum provides guidance and instructions for submitting your ACS packet. Please read this memorandum and follow instructions completely. This will improve timely processing of your nomination packet.

2. Preparation.

a. Apply to selected universities.

- 1) [If ACS Candidate] Contact training agency POC for a list of preferred schools that offer the academic programs that will best serve the needs of the Army. Ensure your request is for quality graduate programs in a traditional main campus classroom setting. Executive or weekend programs and attendance at "satellite campus" are not within the intent of AR 621-1. Advanced Education Programs Branch will do all it can to honor the desire and recommendation of the training agency. However, the final approval authority for your nomination is the Chief, Advanced Education Programs Branch.
- 2) [If GrADSO candidate] Contact training agency POC with your choices of preferred school and program. Ensure your request is for quality graduate programs in a traditional main campus classroom setting. Executive or weekend programs and attendance at "satellite campus" are not within the intent of AR 621-1.
- 3) [If ACS/PB-GSIP Candidate] You are authorized to apply to U.S. accredited universities that falls into the cost category based on FY21 quota allocations: Low \$0-28,000, Medium \$28,001-48,000, or High \$48,001-60,000 annual (full 12 months of school attendance) cost category. The PB-GSIP is **\$60,000**. The standard for meeting a cost category is the student specific tuition agreement with the university that includes both tuition and mandatory fees. Do not apply to a university that does not fall into your authorized cost category and do not select a degree scheme that requires travel, as no TDY funding is available for ACS.
- 4) [If ACS//PB-GSIP Candidate] You will not be able to attend a university that exceeds your authorized cost category; however you may, attempt to negotiate a reduced tuition agreement with the university that will place that institution in your authorized cost category. Ensure you follow tuition negotiation guidance in Section D-3 of the AEPB SOP when speaking to a university. You are expected to seek tuition reduction even if the university is within your allotted cost category. You may accept scholarships and grants from authorized organizations (including the university) that do not provide a conflict of interest but the payment of those must be directly to the university to offset tuition and fees. You may not accept any money directly, nor are you authorized to offset tuition by paying tuition from your pocket.
- 5) [If GrADSO Candidate] There is no current cost cap on tuition for GrADSO participants. However you are encouraged to attempt to negotiate a reduced tuition agreement with the university to lower the burden on the government. Ensure you follow tuition negotiation guidance in Section D-3 of the AEPB SOP when speaking to a university. You may accept scholarships and grants from authorized organizations (including the university) that do not provide a conflict of interest but the payment of those must be directly to the university to offset tuition and fees. You may not accept any money directly, nor are you authorized to offset tuition by paying tuition from your pocket.
- 6) The Army is sponsoring the majority of your education costs; in return you are expected to attend a university at the lowest possible tuition rate, for the shortest time possible, serve in a utilization position and complete the incurred Active Duty Service Obligation (ADSO). Where available, you must obtain the in-state rate for tuition.
- 7) There is no reimbursement for application fees, transcripts, health insurance, registration, parking/transportation, graduation fees, student ID, reservation fees, or books. These expenses are the responsibility of the student.
- 8) Officers are required to attend school full-time, to include summer sessions, and complete their degree in the shortest amount of time possible.

- 9) When applying to schools without summer sessions, the officer must provide a plan for the summer session(s) to be approved by Advanced Education Programs Branch and the Student Detachment at Ft Jackson.
 - (a) Possible courses of action for summer may include: 1) directed research; 2) internship; 3) Gainful employment with local ROTC or USAREC organization.
 - (b) Officers that are unable to register for a full-time schedule, as defined by the university, must submit a request for exception.
- 10) A master degree through ACS is limited to 21 months (USMA allocations and GrADSO are 24 months). Do not assume you will receive an extension at the end of your 21 months. Extensions must be requested in advance and approved by AEPB. See the AEPB SOP at the ACS Home Page for details.
- 11) Letters of acceptance must state the following:
 - Name of officer being accepted
 - Statement of acceptance to the school (not “conditional acceptance”)
 - Degree to be obtained (MA, MS, Ph.D., LL.M., etc.)
 - Department and discipline to which admitted
 - Registration and class start dates
 - Inclusive dates of the officer’s program of study (**imperative that they be accurate**)
 - Expected graduation date
 - Length of academic program in terms of required credit hours, months, and number of semesters (i.e. 33 semester hours, 18 months, and 3 semesters)
 - No pre-requisites required.
 - Point of contact at the institution

3. ACS packet IAW AR 621-1. Send the following to your branch or functional area manager for inclusion in your ACS packet:

- 1) DA Form 1618 (Application for Detail as Student Officer at a Civilian Educational Institution or at Training with Industry)—completed and signed.
- 2) Letters of Acceptance with the required information.
- 3) Tuition Agreement outlining the program of study. Must say resident status for universities that grant resident tuition to military students. Detailed itemized listing of tuition and mandatory fees by term/quarter/semester for the entire program of study. **Student will initial requested tuition amount prior to submission to denote understanding of authorized tuition limit.** Depending on the school, the tuition and fees for that period beyond the first year may be an estimate.
- 4) DA Form 2125 outlining the program of study by semester/term initialed by your academic advisor.
- 5) Undergraduate and graduate transcripts for **ALL** college level courses taken. If applying to the Syracuse University Defense Comptroller Program, submit two official transcripts.
- 6) Waiver requests: Waivers and Exception to Policy requests are in memorandum format and state why the officer should receive an exception. Samples are available in Section D-7 and 8 of the SOP. All Waivers will be submitted through the officer’s Assignments Branch to AEPB. Chief, Advanced Education Programs Branch is the approval authority.
- 7) Acknowledgement of responsibility (Appendix C).
- 8) Acknowledgement of AERS Utilization (not required for GrADSO/PBGSIP). (Appendix D)

4. Additional information about the ACS program can be found on the ACS Home Page (<https://www.hrc.army.mil/Officer/Officer%20Advanced%20Education%20Programs>) and in AR 621-1, *Advanced Education Programs and Requirements for Military Personnel*.

Point of contact for ACS is your training agency (Career Branch)

Appendix F

Example of memorandum format for ALL waivers

OFFICE SYMBOL

1 August 2023

MEMORANDUM THRU

Commander, U.S. Army Human Resources Command (ATTN: **Branch – Assignments Officer**), 1600 Spearhead Division Avenue, Fort Knox, KY 40121

FOR Commander, U.S. Army Human Resources Command (ATTN: AHRC-OPL-C), 1600 Spearhead Division Avenue, Fort Knox, KY 40121

SUBJECT: Time in Service (TIS) Waiver for Over 17 Years Active Federal Service (AFS) Upon Entry into the Army's Fully Funded Advanced Civil Schooling (ACS) Program

1. I am requesting a TIS waiver to participate in the Army's fully-funded Program. If selected, and upon entry into the ACS Program, I will have **XX.X** years (or **XX** months) of Active Federal Service at the time I will begin my educational program.
2. This is **X.X** years (or **XX** months) greater than the 17 years stipulated in AR 621-1, Para 6-1d (1).
3. If selected, and upon entry into the ACS Program, I understand that I will incur Active Duty Service Obligation (ADSO) IAW AR 350-100.
4. I will completely fulfill my ADSO and required utilization tour incurred as a result of participation in the ACS Program. I will not request to separate from military service prior to fulfillment of my ADSO, and I understand that any request to do so may be disapproved.
5. I may be contacted at **(111) 222-3333** should there be any questions.

JOHN C. DOE
CPT, EN
Commanding

Appendix G

Example request for exception to policy (ETP)

OFFICE SYMBOL

4 February 2023

MEMORANDUM THRU

Commander, U.S. Army Human Resources Command (ATTN: **Branch – Assignments Officer**), 1600 Spearhead Division Avenue, Fort Knox, KY 40121

FOR Commander, U.S. Army Human Resources Command (ATTN: AHRC-OPL-C), 1600 Spearhead Division Avenue, Fort Knox, KY 40121

SUBJECT: Exception to Policy (ETP) to the Army's Fully Funded Advanced Civil Schooling (ACS) Program for an Extension.

1. I am requesting an ETP to the Army's fully-funded Program. I am requesting an extension from 21 months to **XX** months not to exceed 24 months.
2. Justification: (Officer states reasons why the extension is necessary, i.e. what happened during the semester that led to the extension request).
3. This is stipulated in AR 621-1, Para 6-1.
4. If approved, I understand that I will incur an Active Duty Service Obligation (ADSO) IAW AR 350-100.
5. I will completely fulfill my ADSO and required utilization tour incurred as a result of participation in the ACS Program. I will not request to separate from military service prior to fulfillment of my ADSO, and I understand that any request to do so may be disapproved.
6. I may be contacted at **(111) 222-3333** should there be any questions.

JOHN C. DOE
CPT, EN
Commanding

Appendix H

Example of utilization deferment request

OFFICE SYMBOL

1 August 2023

MEMORANDUM THRU

Chief, (OSD), U.S. Army Human Resources Command (ATTN: AHRC-OPB-E), 1600 Spearhead Division Avenue, Fort Knox, KY 40122

Chief, Advanced Education Programs Branch (AHRC-OPL-C), U.S. Army Human Resources Command, 1600 Spearhead Division Avenue, Fort Knox, KY 40122

Chief, Leader Development Division (ATTN: AHRC-OPL), U.S. Army Human Resources Command, 1600 Spearhead Division Avenue, Fort Knox, KY 40122

FOR Director, Officer Personnel Management Directorate, U.S. Army Human Resources Command (ATTN: AHRC-OPB), 1600 Spearhead Division Avenue, Fort Knox, KY 40121

SUBJECT: Request for AERS Utilization Tour Deferment for CPT **Officer Name**, XXX-XX-1234

1. Request AERS Utilization Tour Deferment for CPT **Officer Name** following his graduation from his ACS Program sponsored Master's Degree in May 2018.
2. Justification: **Justification for requesting deferment.**
3. Current AERS fill rate: **XX%**
4. The point of contact for this action is **MAJ John C. Doe, FA 49** Assignment Officer, at 502-613-1234 or email john.c.doe.mil@army.mil.

JOHN C. DOE
CPT, EN
Commanding

Appendix I

Example of utilization tour credit

AHRC-OPA-E

1 August 2023

MEMORANDUM THRU

Chief, OSD, U.S. Army Human Resources Command (AHRC-OPB-E), 1600 Spearhead Division Avenue, Fort Knox, KY 40122

Chief, Advanced Education Programs Branch (AHRC-OPL-C), U.S. Army Human Resources Command, 1600 Spearhead Division Avenue, Fort Knox, KY 40122

Chief, Leader Development Division (AHRC-OPL), U.S. Army Human Resources Command, 1600 Spearhead Division Avenue, Fort Knox, KY 40122

FOR Director, Officer Personnel Management Directorate, U.S. Army Human Resources Command (AHRC-OPZ), 1600 Spearhead Division Avenue, Fort Knox, KY 40122

SUBJECT: Request for AERS Utilization Tour Deferment for MAJ John J. Smith, XXX-XX-1234

1. Request AERS Utilization Tour Deferment for MAJ John J. Smith following his graduation from his ACS Program sponsored Master's Degree in May 2018.
2. Justification: Justification for requesting deferment.
3. Current AERS fill rate: %
4. The point of contact for this action is MAJ John C. Doe, FA 49 Assignment Officer, at 502-613-1234 or email john.c.doe.mil@army.mil.

JOHN C DOE
MAJ, FA 49
Assignment Officer

Appendix J

Example for an 18 month program tuition

A. University on the semester system:

- (1) **(Tuition rate per credit hour)** times **(number)** of credits for 1st semester
Fees for 1st semester—**[List all mandatory]**
Total tuition and fees for 1st semester
(Tuition rate per credit hour) times **(number)** of credits for 2d semester
Fees for 2d semester—**[List all mandatory]**
Total tuition and fees for 2nd semester
(Tuition rate per credit hour) times **(number)** of credits for 3d semester
Fees for 3d semester—**[List all mandatory]**
Total tuition and fees for 3d semester

Total tuition and fees (for first calendar year)_____.

- (2) **(Tuition rate per credit hour)** times **(number)** of credits for 4th semester
Fees for 4th semester—**[List all mandatory]**
Total tuition and fees for 4th semester
(Tuition rate per credit hour) times **(number)** of credits for 5th semester
Fees for 5th semester—**[List all mandatory]**
Total tuition and fees for 5th semester
Total tuition and fees (for second calendar year)_____.

Total tuition and fees for total program_____.

B. University on the quarter system:

- (1) **(Tuition rate per credit hour)** times **(number)** of credits for 1st quarter
Fees for 1st quarter—**[List all mandatory]**
Total tuition and fees for 1st quarter
(Tuition rate per credit hour) times **(number)** of credits for 2d quarter
Fees for 2d quarter—**[List all mandatory]**
Total tuition and fees for 2d quarter
- (Tuition rate per credit hour)** times **(number)** of credits for 3d quarter
Fees for 3d quarter—**[List all mandatory]**
Total tuition and fees for 3d quarter
(Tuition rate per credit hour) times **(number)** of credits for 4th quarter
Fees for 4th quarter—**[List all mandatory]**
Total tuition and fees for 4th quarter
Total tuition and fees (for first calendar year)_____.

(2) **(Tuition rate per credit hour)** times **(number)** of credits for 5th quarter
Fees for 5th quarter—**[List all mandatory]**

Total tuition and fees for 5th quarter

(Tuition rate per credit hour) times **(number)** of credits for 6th
quarter Fees for 6th quarter—**[List all mandatory]**

Total tuition and fees for 6th quarter

Total tuition and fees (for second calendar year)_____.

Total tuition and fees for total program_____.

Appendix K

Example of TDY Funded by a Federal Source

TDY Funded by Federal Source *CHECKLIST/REQUEST*

RANK/NAME/SSN (Last 4):

CURRENT MAILING ADDRESS:

CAREER BRANCH/FUNCTIONAL AREA:

PROGRAM ENROLLED IN OR REQUESTING TO ENROLL IN:

DUTY LOCATION:

TDY DESTINATION:

DATES:

NUMBER OF DAYS:

ORGANIZATION FUNDING THE TDY:

JUSTIFICATION:

EMAIL ADDRESS/PHONE NUMBER:

Attachments:

ENDORSEMENT FROM CIVILIAN INSTITUTION: Detailing that TDY required for program of study and/or that it will not interfere with the officer's program of study

ENDORSEMENT FROM TRAINING AGENCY/BRANCH/FA:

Appendix L

Example of TDY Funded by a Non-Federal Source

Acceptance of Payment from a Non-Federal Source For Travel Expenses While in Official Capacity

Section 1353 of title 31, United States Code, permits non-Federal sources, such as organizations, associations, or businesses, to pay the Government for travel, subsistence, and related expenses incurred by Government personnel while in their official capacities to attend meetings, conferences, seminars, symposia, and other similar functions.

The law has been implemented by the General Services Administration (Federal Travel Regulation, 41 C.F.R. Section 304-1(b)). This regulation prohibits the solicitation of payment for expenses.

Before travel payments are accepted from a non-Federal source, prior approval must be granted from the travel approving authority (HRC, ATTN: AHRC-OPF-L), who must make the following determinations:

- Payment is for attendance at a meeting, conference, seminar, speaking engagement, symposium, training course, or receipt of an award or honorary degree related to official duties. This authority does not permit acceptance of payments for promotional vendor training or other events in which the primary purpose is marketing the non-Federal source's products or services, or events required to carry out an agency's statutory and regulatory functions, such as inspections, audits, site visits, or negotiations. In addition, the event need not be a "widely attended gathering".
- Payment is for travel related to the employee's official duties, and the employee must be in a travel status. Payments or benefits offered by a non-Federal source may be limited by qualifying acceptance to attend only a portion of the function that is deemed to be in the Government's interest.
- Payment may be accepted only from a non-Federal source that is not disqualified because of a conflict of interest. A "conflicting source" of payments is a non-Federal organization that "has interests that may be substantially affected by the performance or nonperformance of the employee's duties." The approving authority must consider the circumstances to determine that acceptance would not cause a reasonable person with knowledge of all the relevant facts to question the integrity of the Government's programs or operations.
- Approval of payments from a non-Federal source should take into consideration the identity of other expected participants.
- Travel is primarily for the benefit of the Government and not the organization paying for it.

Procedures:

1. The acceptance of travel benefits must be approved by HRC (AHRC-OPF-L) ninety (90) days prior to travel. Submit the required memorandum, subject: Travel Paid by Non-Federal Source Request for TDY to HRC (AHRC-OPF-L) (Mr. Jones) via email to daniel.d.jones12.civ@army.mil for consideration. This request will be submitted to an Ethics Counselor for recommendation. You will be notified as soon as a decision is made. Once a decision is made, and if it is approved, HRC will type your DD Form 1610, a copy will be submitted to the Student Detachment.

2. Benefits must be paid in kind (e.g., plane tickets, prepaid hotel reservations, etc.). **Cash may not be accepted by DoD employees.** If approved, you will be considered in a TDY status and require an approved DD Form 1610 (Request and Authorization for TDY Travel of DOD Personnel) prior to travel.

3. After travel you **must** file a written report of the payments received **if** the total value of the travel payments received in connection with an event exceeds \$250.00. Standard Form 326 can be used to make this report. This form is available at <http://www.gsa.gov/Portal/home.jsp>. This form will be submitted to HRC, ATTN: AHRC-OPF-L (Mr. Kenneth Mackey), which will submit it to the HRC Ethics Counselor.

Travel Paid by Non-Federal Source
Request for TDY

- (1) Name
- (2) SSN - Last 4 -
- (3) Grade
- (4) Name of Program (TWI/ACS, etc.)
- (5) Duty Location (University/Industry Name & City & State):
- (6) Phone Number
- (7) Approx. # of TDY days
- (8) Estimated Cost of Airfare
- (9) What will the industry pay for (e.g. travel, lodging, etc.)
- (10) What won't the industry pay for (e.g. travel, lodging, meals) and are you requesting Army funds
- (11) Sponsor of Event
- (12) Place of Departure (City & State & ZIP Code)
- (13) Airport flying out of
- (14) Proceed Date
- (15) Destination(s) (City & State & ZIP Code)
- (16) Airport flying into
- (17) Mode of Transportation (e.g. FLY; Driving, etc.)
- (18) If you fly, how will you purchase your ticket? (Use DD Form 1610 Fund Cite or Government Credit Card).
- (19) Purpose of TDY (fully explain purpose of TDY and relevance to your program)
- (20) Rental (Yes/No) (if yes, fully provide justification & estimated distance).
- (21) Complete email address.
- (22) Do you have a Government Credit Card (Yes) or (No) (check one)
- (23) Is there a Conference/Registration Fee? If so, how much?
- (24) Are you requesting leave in conjunction with this TDY? If so, what are the dates
- (25) Remarks (if any)
- (26) I have read and understand the following statement

"Payment of trip by non-Federal source is for attendance at a meeting, conference, seminar, speaking engagement, symposium, training course, or receipt of an award or honorary degree related to official duties. This authority does not permit acceptance of payments for promotional vendor training or other events in which the primary purpose is marketing the non-Federal source's products or services, or events required to carry out an agency's statutory and regulatory functions, such as inspections, audits, site visits, or negotiations. In addition, the event need not be a widely attended gathering. Payment is for travel related to training/education. Payment of travel is in kind (e.g. plane tickets, prepaid hotel reservations). Travel is primarily for the benefit of the Government and not the organization paying for it. I further understand that 41 C.F.R. Section 304-1(b) prohibits solicitation of payment for these expenses".

(Typed name of student)

Signature of student/date)

Appendix M

Example of Permissive TDY Checklist/Request

PERMISSIVE TDY **CHECKLIST/REQUEST**

RANK/NAME/SSN (Last 4):

CURRENT MAILING ADDRESS:

CAREER BRANCH/FUNCTIONAL AREA:

PROGRAM ENROLLED IN OR REQUESTING TO ENROLL IN:

DUTY LOCATION:

PERMISSIVE TDY DESTINATION:

DATES:

NUMBER OF DAYS:

JUSTIFICATION:

EMAIL ADDRESS/PHONE NUMBER:

Attachments:

ENDORSEMENT FROM CIVILIAN INSTITUTION: Detailing that PTDY required for program of study

ENDORSEMENT FROM TRAINING AGENCY/BRANCH/FA: