

UTAH NATIONAL GUARD
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UTAH NATIONAL GUARD STATE EDUCATION PROGRAMS

Summary: This policy is in effect until superseded. It provides information and describes procedures for administering the Utah National Guard state education incentive programs.

Applicability: This policy supersedes State Operations Policy 26-01 (dated 1 July 2025) and is applicable to all Utah Army and Air National Guard Soldiers and Airmen.

Proponent and Exception Authority: This policy is promoted by State Operations in conjunction with the Army Joint Force Headquarters—G1 (Manpower & Personnel) and the Air Guard Flight Services Squadron (FSS). The Director of State Operations and the respective Assistant Adjutants General have the authority to approve exceptions to this policy that are consistent with State of Utah law and policy.

Interim Changes: Interim changes to this policy are only official if authenticated by the Adjutant General. This policy becomes obsolete when rescinded, amended, or extended.

Current Information: Current information can be found on the Utah National Guard official website: <https://guard.utah.gov/education-services/>.

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CHAPTER 1
PROGRAM OVERVIEW

1-1. GENERAL

The Utah legislature provides funds for state incentive programs for members of the Utah National Guard. This policy describes the eligibility criteria and procedures for administering the Utah National Guard state education programs.

1-2. REFERENCES

- a. Senate Bill 2, New FY Supplemental Appropriations Act
- b. Utah House Bill 7, National Guard, Veterans Affairs, and Legislature Base Budget
- c. Utah House Bill 19, Higher Education Financial Aid Amendments
- d. AR 135-91, Service Obligations, Methods of Fulfillment, Participation Requirements, and Enforcement Provisions
- e. Army Regulation 600-8-2, Suspension of Favorable Personnel Actions (Flag)
- f. Air Force Instruction 36-2907, Adverse Administrative Actions
- g. DoD Instruction 1332.45, Retention Determinations for Non-Deployable Service Members
- h. Utah House Bill 376, National Guard Amendments (2025 General Session)

1-3. PURPOSE

The purpose of the state educational benefit programs is to:

- a. Incentivize recruitment and retention of qualified service members for the Utah National Guard.
- b. Incentivize members currently assigned to the Inactive National Guard (ING) or Individual Ready Reserve (IRR) to re-affiliate with the Utah National Guard.
- c. Incentivize current Utah National Guard members to extend their commitment with the Utah National Guard.
- d. Improve the qualifications of Utah National Guard members through higher education.

e. Reward eligible Utah National Guard members for their willingness to serve the needs of the State of Utah when ordered by the Governor or the President of the United States, in support of state or federal missions.

1-4. RESPONSIBILITIES

a. The Adjutant General. The Adjutant General (TAG) is responsible for overall policies, guidance, administration, implementation, and proper utilization of the Utah National Guard incentive programs.

b. State Operations. The Director of State Operations administers the program for TAG and is the official designee of TAG for such purposes. State Operations is also responsible for obligating and accounting for all funds supporting tuition assistance programs. State Operations personnel are responsible for the Student School Loan Repayment (SSLR) program with support from both the Army and Air personnel sections.

c. The Joint Force Headquarters. The Army and Air JFHQs execute the program for their respective components. The Assistant Adjutants General may grant further sub-delegation of authority. The Joint Force Headquarters can delegate responsibilities to the Flight Services Support Squadron.

d. Recruiting and Retention Battalion (Army) and Air JFHQ recruiters to include Battalion Retention NCOs and ANG Retention Office Manager. The Recruiting and Retention organizations utilize all incentives offered by the State of Utah incentive programs to promote recruiting and retention.

e. National Guard Commanders. Commanders at all levels ensure members of their command are informed of the Utah National Guard state incentive programs. They must ensure members who are receiving state incentives remain eligible.

f. National Guard Members. National Guard members (both Army and Air) are responsible for applying for the education benefits for which they are eligible according to the guidelines within this policy. Current benefits and applications will be available on the Utah National Guard Education website: <https://guard.utah.gov/education-services/>

g. The G1-Education Office manages the State Tuition Waiver (STW) and the State Tuition Assistance (STA) programs. The G1-Education office also supplies Army personnel support to State Operations for the Student School Loan Repayment (SSLR) program.

1-5. FUNDING

The funding available for the state education benefit programs is limited by the appropriations set by the state legislature. If the legislature does not authorize future funding or if funds are depleted, neither the State of Utah nor the Utah National Guard are obligated to continue the program. The Utah National Guard State Education

program can be changed without notice if it is in the best interest of the Utah National Guard.

1-6. STATE FISCAL YEAR

The state fiscal year (FY) begins on 1 July and ends on 30 June. Funding is appropriated and distributed by state FY. Funding limits can depend on the state or federal FYs (or both) depending on the individual situation.

1-7. SATISFACTORY PARTICIPANT

A Utah National Guard service member is considered a satisfactory participant if:

a. They are an active drilling member of their unit of assignment or attachment. An active drilling member is defined as satisfactorily attending monthly drills and annual training (AT).

b. They are a satisfactory participant (Army) as defined in Army Regulation 135-91, "Service Obligations, Methods of Fulfillment, Participation Requirements, and Enforcement Provisions" or (Air) as defined by Air National Guard Instruction 36-2001, "Personnel Management of Training and Operational Support within the Air National Guard."

c. They are currently deployable per the criteria required for their current duty position. If not, they must be making diligent and measurable progress toward becoming deployable.

d. They are not under Suspension of Favorable Personnel Action (SFPA) / Unfavorable Information File (UIF): IAW references Army Regulation 600-8-2, Air Force Instruction 36-2907, and DoD Instruction 1332.45, as applicable. Service members are ineligible for state tuition benefit programs if flagged for any reason, resulting in the inability to extend their service with the Utah National Guard or deploy/mobilize.

e. They have a current and passing Army Fitness Test (AFT) score with an effective date within 12 months and Army Body Composition Program (ABCP) which complies with Army standards; the effective date must be within eight months of contract signature date for the incentive. Airmen must have passed the last recorded Fitness Assessment (FA) and be compliant with Air Force standards with an effective date within 12 months of the contract signature date for the incentive. Soldiers and Airmen with medical waivers for their respective fitness tests are eligible for the program

1-8 ELIGIBLE SCHOOLS

STA funds, to include loan repayment, may be used for any accredited college, university, or technical school. Exceptions to Policy (ETPs) may be requested for non-accredited programs that directly support the mission of the Utah National Guard.

1-9. RECOUPMENT

a. Funds paid under the Utah National Guard education benefit programs may be recouped from individuals who fail to complete the terms outlined in this policy and its respective annexes.

b. Further details regarding recoupment procedures are explained within the applicable chapter for each program.

1-10. EXCEPTIONS TO POLICY (ETP)

a. When extenuating circumstances exist, a request for an ETP may be initiated. For detailed instructions on how to submit an ETP, contact the G1 Education Services Office or Air JFHQ recruiters.

b. Exceptions to policy will be granted at various levels of the chain of command as determined by the respective service. For tuition assistance above the \$7,000 limit, reduction of the commitment to the Utah National Guard, or payment for additional post secondary degrees beneficial to the Utah National Guard, the Adjutant General is the approving authority with concurrence from the Director of State Operations.

CHAPTER 2

STATE TUITION ASSISTANCE (STA) PROGRAM

2-1. GENERAL

The State of Utah sponsors the state tuition assistance program. The state legislature appropriates funding for the program annually. The state loan repayment program can be changed at any time to meet the needs of the Utah National Guard.

2-2. ELIGIBILITY

The program is available to current active members of the Utah National Guard who are:

a. Serving satisfactorily per paragraph 1-7.

b. All service members eligible for Federal Tuition Assistance (FTA) must simultaneously use FTA funds with State Tuition Assistance (STA). STA may be requested for any remaining amount of tuition and fees after FTA is applied, not to exceed the actual cost of tuition and fees. In certain circumstances, service members who are not eligible for FTA may be eligible to use STA without first applying for FTA.

c. Service members attending school full-time (12-18 credit hours) at a Utah Public College or University must apply for the State Tuition Waiver (STW) prior to applying for STA. A list of applicable schools is available at www.ushe.edu.

2-3. SERVICE COMMITMENT

a. At the time of application, the Utah National Guard member's expiration term of service (ETS) or mandatory removal date (MRD) should be at least two years beyond the end date of any courses for which funding is requested for any degree. For all members, officer and enlisted, if the service member does not have two years remaining on their formal commitment to serve in the Utah National Guard, they must complete two years of service or face recoupment of the funds from the state of Utah.

2-4. RATE OF PAYMENT STATE TUITION ASSISTANCE

a. The Utah National Guard will pay tuition and fees charged for eligible coursework at accredited state post-secondary institutions directly to the school, up to a maximum of \$7,000 per state fiscal year. The state fiscal year is from 1 July to 30 June each year. "Fees" include: special course fees, expenses for required textbooks, and/or course related materials.

b. Exceptions to policy (ETP) for an increased annual limit or funding, reduction in the commitment to the Utah National Guard, or payment for additional post secondary degrees, beneficial to the Utah National Guard, may be requested through the chain of command to the Adjutant General.

c. Other exceptions to policy (e.g., late submissions-first offense, etc.) will be approved at the respective personnel level with the appropriate paperwork.

2-5. AUTHORIZED USES

a. The STA will not pay for a degree equivalent to or lower than the level of degree the service member was previously awarded for which any form of STA was used. ETPs may be requested for additional programs that are in the best interest of the Utah National Guard.

b. Only courses for one program can be funded at a time. Requests for funding toward multiple and concurrent education programs will be denied.

c. The STA may be used to fund tuition, fees, and books for one degree at each level for each service member that applies:

(1) Associate degree. Exception: Because they are tied to an Air Force Specialty Code (AFSC), STA may be used to complete multiple Associate Degrees from the Community College of the Air Force.

(2) Bachelor's Degree

(3) Master's Degree

(4) Professional or Doctorate Degree

d. A certificate or credential can be funded regardless of current degree level

(1) License / Certificate from a state technical school

(2) Professional Certificate (undergraduate or post-bachelor/graduate certificate)

2-6. COURSE REQUIREMENTS

a. Payment is authorized for:

(1) Accredited college, university, or technical schools. ETPs may be requested for non-accredited programs that are in direct support of the mission of the Utah National Guard.

(2) Course(s) required within the degree plan.

b. Payment is **not** authorized for:

(1) Course(s) not required for the program.

(2) Exam prep course(s) or exams (e.g., GRE, GMAT, LSAT, EMT.).

(3) Course(s) that earn continuing education units (CEUs) that are required to maintain professional licensure (these courses may be paid through other funding sources). Payment may be authorized for some certificate program courses that earn CEUs if they are academic in nature, not required to obtain or maintain professional licensure, and are conducted by an accredited institution. The education services officer is the approval authority for certificate courses that earn CEUs.

(4) Study abroad fees.

(5) If a course is not completed or not dropped within the school's official drop window, costs will be recouped from the service member.

c. If a student receives a tuition waiver (no tuition paid by the student or the fee statement indicates no tuition charges), payment for tuition is not authorized. Fees may be eligible for payment.

d. Service members must make satisfactory academic progress by receiving a grade of C or better, or equivalent, in each class to avoid recoupment.

2-7. GUIDELINES

a. Tuition and fees are paid once the school invoices the State Operations finance department (also known as the SMD). All tuition and fees requested must be invoiced from and paid directly to the school.

b. Service members must update the statement of agreement (SOA) each school year.

c. Service members must ensure that their schools submit an invoice for payment to the State Operations department no later than 30 days from the last official day of the course/term.

d. The school's invoice will determine the amount of payment. Invoices must list certain other benefits paid directly to the school, including:

(1) Federal Tuition Assistance (FTA)

(2) Invoices must list all Chapter 33/Post 9-11 GI Bill or any other federal GI Bill chapter paid directly to the school. The combination of GI Bill benefit and state school tuition and fee payment program must not exceed 100 percent of tuition and/or fee costs.

(3) Scholarship information resulting in a reduction of tuition and fees.

(4) ROTC tuition scholarship recipients do not report room and board scholarships or stipends.

2-8. APPLICATION PROCEDURES

a. Service member's Responsibilities:

(1) Submit required application forms and documents at least eight days before the start date. Current applications are available on the Utah National Guard's public-facing website: <https://guard.utah.gov/education-services/>.

(a) State school tuition assistance application.

(b) Statement of Agreement – updated annually.

(c) Unofficial transcript that clearly shows the service member's current GPA and the schedule for the upcoming classes for which the service member is requesting funding. This is not applicable for a first semester student. .

(d) Invoice which clearly shows the amount of tuition and fee charges; this must be provided by the institution.

(e) Applications are submitted through the portal: guard-statetuition.utah.gov

(2) Submit a grade report within 30 days of course completion

(3) Verify that the school submitted an invoice to the state no later than 30 days from the last official day of the course/term.

c. Education Office Responsibilities:

(1) Ensure the service member is eligible and that the service member has a signed Statement of Agreement (SOA).

(2) Process applications.

(a) Verify all application information is correct. This may require contacting the student's school.

(b) Calculate the actual amount to obligate.

(3) Deny incomplete or late payment requests, or requests for those service members who are not a satisfactory participant according to paragraph 1-7.

(4) Request, receive, and track grades for all funded STA applications. Notify State Operations of all non-passing grades in order to allow for Recoupment of funds.

2-9. STA RECOUPMENT CRITERIA

a. If voluntarily separated or separated “for cause” before completion of their two-year commitment, as per paragraph 2-3, service members will be subject to full recoupment of awarded and/or used funds paid to the school.

b. If the student has an incomplete course, the service member will be required to pay back the State of Utah.

c. If the student has not maintained satisfactory academic progress (C in each class), the service member will be required to pay back or set up a payment plan with the State of Utah before requesting any additional state tuition assistance funding.

2-10. SIMULTANEOUS MEMBERSHIP PROGRAM (SMP)

Members of the Utah National Guard participating in the SMP program are exempt from the two-year commitment because they incur a service commitment through their commissioning source.

2-11. EXCEPTION TO POLICY

a. When extenuating circumstances exist, a request for an ETP may be initiated. For detailed instructions on how to submit an ETP, contact the G1 Education Services Office or Air JFHQ recruiters.

b. Exceptions to policy will be granted at various levels of the chain of command as determined by the respective service. For tuition assistance above the \$7,000 limit, reduction in commitment to the Utah National Guard, or payment for additional post secondary degrees beneficial to the Utah National Guard, the Adjutant General is the approving authority with concurrence from the Director of State Operations.

CHAPTER 3

STATE TUITION WAIVER (STW) PROGRAM - SCHOLARSHIP

3-1 STATE TUITION WAIVER PROGRAM OVERVIEW

The State Tuition Waiver Program (STW) is a competitive scholarship program to support a Utah National Guard member's professional and/or personal self-development goal in pursuit of a higher education degree. This program is based upon a student's academic standing (Grade Point Average score) and additional application requirements. STW is an "up front" program. This means that no benefit payment(s) will ever be made directly to the student.

3-2 PERIOD OF AWARD

The recipient's award is on a school year to school year basis. Service members may simultaneously use the STW for tuition and STA for fees and course materials. Service Members must submit a new application for each successive school year. Participation in the STW program must be clearly annotated during the STA application process to prevent overpayment.

3-3 ELIGIBILITY

a. The individual must be a UTNG (Army or Air) service member, a satisfactory participant, as listed in paragraph 1-7 above to be eligible for receipt of STW program benefits.

b. Students must be attending a public, degree granting institution to be able to apply for and participate in this program. Utah public technical colleges do not participate in the STW program. The schools listed below are all participants in the STW program: Salt Lake Community College, Snow College, Southern Utah University, University of Utah, Utah State University, Utah Tech University, Utah Valley University, and Weber State University.

c. State Operations is responsible for determining the eligibility requirements and an order of merit. However, this may be delegated to the G1 section. UTNG Members must comply with the following requirements:

- (1) Receive acceptance as a student to an eligible institution for the upcoming school year
- (2) Will be attending the school as a full-time (12-18 credit hours) student. Students may apply for one or both semesters of the STW program
- (3) Is Military Occupational Specialty (MOS)/Air Force Specialty Code (AFSC) qualified
- (4) Does not have a 4-year degree

(5) Is not receiving DOD funded scholarships for Tuition and Fees

d. Active Guard Reserve members, contact:

(1) For **AGR Air Guard** members, contact your Education Support Officer representative at Hill Air Force Base for available education support programs.

(2) **AGR Army Guard** members must contact the Education Services Officer in Draper: ng.ut.utarng.mbx.education-office@army.mil

e. The Assistant Adjutants General may consider exceptions on a case-by-case basis.

f. Temporarily Mobilized/active-duty Utah National Guard members. Utah National Guard Members serving on active duty for the entire length of the course should seek federal funding, where practical, through their respective service component active-duty Education Servicing Center.

<https://guard.utah.gov/federal-programs/>.

g. All members of the Utah National Guard may qualify for monetary assistance to complete educational goals through Federal Tuition Assistance and State Tuition Assistance regardless of their active-duty status.

3-4 ADMINISTRATION OF STATE WAIVER PROGRAM

For STW recipients, respective school administrations may require a higher grade point average (GPA). The minimum required GPA for STW is a grade of C or better, or the equivalent (e.g. Utah State University currently requires a 2.75 GPA).

3-5 APPLICATION REQUIREMENTS

a. UTNG members are required to apply for the Utah National Guard State Tuition Waiver Application if they are attending full time (12-18 credit hours) at a participating school prior to applying for federal or state tuition assistance programs.

b. Students must apply between January 1st and April 30th prior to the school year in which you will attend. If waivers are still available after the award period servicemembers may be able to apply after the deadline.

c. Use the following forms for administration of the STW program:

(1) Utah National Guard State Tuition Waiver Application as available on the Utah National Guard's public facing website (<https://guard.utah.gov/education-services/>).

(2) Submit a short essay (1-2 pages - double spaced) highlighting goals and plans for the chosen academic degree.

(3) Submit a copy of school transcripts for all high school, college, or universities attended. Copies of the transcripts may be unofficial (copied and pasted into a word document). The unofficial transcripts must have the service member's name and the name of the school on the copy and on the pasted document.

(4) Scholarship Cadets. Cadets must submit a memo from their ROTC Professor of Military Science to verify they are not receiving Guaranteed Reserve Forces Duty Scholarships (GRFDSP) for tuition..

3-6 SERVICE COMMITMENT

a. At the time of application, the Utah National Guard member's expiration term of service (ETS) or mandatory removal date (MRD) must be at least two years beyond the end date of any courses for which funding is requested.

b. Members of the Utah National Guard participating in the Simultaneous Membership Program (SMP) program are exempt from the two year commitment because they incur a service commitment through their commissioning source.

3-7 RECOUPMENT

Applicants are responsible for notifying the education office if there are any changes in course status, such as additions, drops, or withdrawals. Students who fail to make satisfactory academic performance with any of the following may subject to the recoupment:

Grade - E or F

Withdrawal - W

Incomplete - I (student did not finish within 120 days)

3-8. EXCEPTION TO POLICY

a. When extenuating circumstances exist, a request for an ETP may be initiated. For detailed instructions on how to submit an ETP, contact the G1 Education Services Office or Air JFHQ recruiters.

CHAPTER 4 STUDENT SCHOOL LOAN REPAYMENT

4-1 STUDENT SCHOOL LOAN REPAYMENT OVERVIEW

a. In 2025, the state of Utah legislature added authorization, under the State Tuition Assistance umbrella, to allow repayment of school loans for current members of the Utah National Guard. If the legislature does not authorize future funding or if funds are depleted, neither the State of Utah nor the Utah National Guard are obligated to continue the program. In addition, the state loan repayment program can be changed at any time to meet the needs of the Utah National Guard. If the legislature does not authorize future funding or if funds are depleted, neither the State of Utah nor the Utah National Guard are obligated to continue the program.

b. Each eligible member may receive benefits under either the State Tuition Assistance (STA) or Student School Loan Repayment (SSLR) once per state fiscal year (1 July to 30 June). Applications submitted for both programs in the same fiscal year will result in disqualification from both benefits for that period.

c. For FY2026, beginning 1 July 2025, there will be a limited number of loan repayments issued. After the limit has been reached, a waitlist will be established based on the date of the member's completed application. On or after 1 January 2026, the status of the State tuition program will be assessed for additional loan repayments. If money is available, the loan repayments will be processed from the loan repayment waitlist.

4-2. ELIGIBILITY

a. The program is available to current active members of the Utah National Guard who:

(1) are serving satisfactorily per paragraph 1-7.

(2) Have completed an accredited degree program at any level, from associate degree through doctoral program.

(3) This loan repayment is for the first degree (at any level of post secondary education)

(4) Members must choose either the State Tuition Assistance or the Student School Loan Repayment (SSLR) each fiscal year. Members who apply for SSLR must certify that they have not applied for or received State Tuition Assistance benefits for the same state fiscal year

4-3. SERVICE COMMITMENT

a. By signing the statement of agreement letter (Annex B), the service member agrees to a two year service commitment to the Utah National Guard. Loan repayments are eligible for recoupment if the commitment is not fulfilled.

4-4. PAYMENT FOR THE STUDENT SCHOOL LOAN REPAYMENT

a. The Utah National Guard will make payments directly to the loan servicer for qualifying student loans, up to a maximum of \$7,000 per state fiscal year. Payments are contingent upon available appropriations and subject to verification of loan status and academic completion as described in Section 4-6. This benefit cannot be combined with the State Tuition Assistance program during the same fiscal year.

b. Exceptions to Policy (ETP) may be considered under limited and justifiable circumstances (e.g. the degree is imperative to the member's employment with the Utah National Guard). Requests for an ETP must be submitted in writing and include a detailed explanation of the rationale. The Adjutant General and the Director of State Operations are the approval authorities.

4-5. AUTHORIZED USES

a. Service members eligible for Federal Student Loan Repayment programs ARE eligible for the Student School Loan Repayment.

b. Use of the State Loan Repayment Plan is limited to one program per degree level. Members who have previously received either tuition assistance or loan repayment for a completed degree of a given level (e.g., associate, bachelor's) may not receive repayment for a second degree of the same or lower level. Exceptions may be considered only under policy paragraph 4-9.

- (1) Members who use State Tuition Assistance to complete a bachelor's degree may not seek loan repayment for a second bachelor's degree or associate degree but may seek loan repayment or State Tuition Assistance for a Master's degree or higher.
- (2) Members who use loan repayment benefits for an associate degree are not eligible for additional repayment benefits for another associate degree but may seek State Tuition Assistance or Loan Repayment for a bachelor's degree or higher.

4-6. SUBMISSION REQUIREMENTS

a. **Loan Statement:** A current statement from the loan servicer dated within the past 60 days, which must include:

- (1) The borrower's name (must match the employee's legal name)
- (2) The name, address, and contact number for the loan servicer
- (3) The loan account number (with sensitive information redacted as appropriate)
- (4) The type of loan (e.g., federal Direct Loan, FFEL, or private loan)
- (5) The original loan amount and current outstanding balance
- (6) The loan's status (e.g., in repayment, deferment, forbearance, or delinquent)
- (7) The interest rate and repayment terms
- (8) Other info as requested by State Operations

b. Proof of Loan Origination: Documentation confirming the loan's origination date and proof that the loan was used solely for qualified education expenses.

This may include:

- (1) A copy of the original loan agreement or promissory note
- (2) School financial aid records
- (3) Official correspondence from the loan servicer

c. Proof of degree completion

(1) Copy of ALL official diplomas awarded (associate degree or higher). Members will only be eligible for reimbursement for the first degree at each level.

4-7. APPLICATION PROCEDURES

a. Service member's Responsibilities:

(1) Submit required application forms and documents any time after 1 July 2025. Current applications are available on the Utah National Guard's public-facing website: <https://guard.utah.gov/education-services/>.

- (a) Student School Loan Repayment - SSLR application
- (b) Statement of Agreement – updated annually.
- (c) Copy of ALL official diplomas
- (d) Invoice or loan documentation which clearly shows the amount of tuition and fee charges; this must be provided by the institution or loan agency. These dates must be prior to the award of the degree.

b. Education Officer Responsibilities:

(1) Ensure the service member is eligible and that the service member has a signed Statement of Agreement (SOA) on file.

(2) Ensure all paperwork is complete.

c. State Operations

(1) Process applications.

- (a) Verify all application information is correct. This may require contacting the student's school or the loan agency.
- (b) Calculate the actual amount to obligate (not to exceed \$7000 per fiscal year).

(2) Deny incomplete payment requests or requests for those service members who are not a satisfactory participant according to paragraph 1-7.

4-8. LOAN REPAYMENT RECOUPMENT CRITERIA

a. If voluntarily separated or separated “for cause” before completion of their two-year commitment, as per paragraph 2-3, service members will be subject to full recoupment of awarded and/or used funds paid to the loan servicer.

4-9. EXCEPTION TO POLICY (ETP)

a. Exceptions to the provisions in this chapter may be requested under limited, mission-essential circumstances. All ETPs must:

(1) Be submitted in writing

(2) Include full justification and documentation, and

(3) Clearly state the benefit requested and the reason for deviation from standard policy.

b. Exceptions to policy may be granted by the Adjutant General with the concurrence of the Director of State Operations. Approval of an exception is at the discretion of the approval authorities and does not establish precedent

DANIEL D. BOYACK
Major General
The Adjutant General

DISTRIBUTION:

A (Army)

F (Air)

ANNEXES

Annex A STA Statement of Agreement

Annex B Student School Loan Repayment Statement of Agreement

Annex C STA ETP for late applications

Annex D STW Application

ANNEX A STATEMENT OF AGREEMENT

STATEMENT OF AGREEMENT (SOA)

UTAH NATIONAL GUARD (ARMY and AIR) STATE TUITION ASSISTANCE PROGRAM (STA)

GUIDELINES

1. AUTHORITY

State Operations Policy 26-01

2. PRIVACY ACT INFORMATION

State Tuition Assistance (STA) forms may include information protected under the Privacy Act 1974. To review and approve STA requests, I authorize STA administrators to forward applicable STA applications and associated forms to my non-military email address.

4. AUTHORIZED RATES

The State of Utah, through the UTNG, may pay up to 100% of my tuition assistance or \$7000 for loan repayment based on the following caps and guidelines:

a. For awardees of the State Tuition Assistance, an annual cap of \$7,000 towards tuition, fees, and course materials paid directly to the institution. Students requesting more than \$7,000 should apply for an ETP.

b. I agree to pay the remaining amount and any other costs not paid by the State of Utah.

c. STA is authorized on a course-by-course basis and no changes will be made in the courses or dollar amount for which STA is approved without the approval of the appropriate Education Office. Changes to previously approved STA must be made within 30 days of class start date.

d. I will use STA fundings for a course (or courses) required to complete my degree or certificate plan and must submit proof or validation of my degree plan or certificate program, along with my grades, no later than 30 days following the completion of my approved course(s). The degree plan and grade certification will be submitted on page 2 of the approved STA application.

e. STA will not be approved to fund a course more than once unless the UTNG member has repaid the funds for the class that was previously taken.

f. By signing this letter, the service member agrees to a commitment of two years to the Utah National Guard. This amount is eligible for recoupment if the commitment is

not fulfilled. Reimbursements will not be paid directly to the service member.

4. ELIGIBILITY

a. I am a Utah National Guard service member in good standing (satisfactory participant) in my unit.

b. I applied for, maximized, or was ineligible for funding through the State Tuition Waiver (STW) and Federal Tuition Assistance (FTA) programs and (choose one):

(1) _____ I am in pursuit of my first degree at the Associate, Bachelor, and Graduate level

or

(2) _____ I am pursuing an additional degree at the Associate, Bachelor, and Graduate level and no funding for my previous degree at this same level was provided by the STA or STW.

5. OBLIGATION

I understand that by receiving UTNG STA, I incur the following obligation. Failure to complete this obligation may result in the recoupment of all or a portion of my UTNG STA.

a. _____ I intend to stay in the Utah National Guard for two years beyond my course anticipated completion date for a Bachelor's Degree (or lower) degree. Members of the Utah National Guard participating in the Simultaneous Membership Program (SMP) program are exempt from the two year commitment because they incur a service commitment through their commissioning source.

b. _____ I understand that if I separate voluntarily or am discharged "for cause", the amount of STA funds invoiced for the semester during which I separated from the guard will be recouped by State Operations.

6. GRADES

a. _____ I understand that I am required to achieve a grade of C or above for each course. If I fail to attain the minimum grade, I will be required to pay back the state, and I may not be eligible for any further STA until the state is repaid.

b. _____ I will provide the State Education Office with proof of successful completion of approved courses within 30 days of completing the class for which I receive UTNG STA. Grade certification will be submitted on page 2 of the approved STA application. Failure to do so will suspend further STA funding until the UTNG Member satisfactorily complies with all STA requirements.

7. CLASS/COURSE SUBMISSION and CHANGES

- a. _____ I may submit my STA request up to 60 days (but not less than eight) before class/semester starts.
- b. _____ I understand that I am responsible for providing a copy of my approved State Tuition Assistance form to my school accounting office within ten days of STA approval. Failure to do so may interrupt or deny STA invoicing and payment to the school.

8. DUPLICATION OF BENEFITS

a. STA is authorized in combination with all GI Bill chapters. GI Bill programs that pay toward tuition and fees are structured as last-pay; STA can be applied up to the maximum authorized rate of \$7,000 per fiscal year, and the school will process the remaining costs subject to compliance with the current VA School Certifying Official Handbook.

b. FTA funds are a “first payer” which means that FTA funds must be used before applying STA benefits.

c. No funding supplied by the STA program can be refunded to the student. Any overages resulting from previously accepted/applied tuition-only programs should be reduced from the amount requested from STA.

d. Any applicable requirements for additional funding or use of funds in conjunction with other monetary sources will follow guidelines set by existing policy.

e. Members must choose either STA or Student School Loan Repayment each fiscal year.

9. WITHDRAWAL

I agree to reimburse the UTNG the STA funds paid if I withdraw from a course except for reasons beyond my control as determined by the Education Services Officer (ESO) or designated representative.

10. RECOUPMENT OF FUNDING

Applicants are responsible for notifying the Education Office if there are any changes in approved coursework, such as class changes, drop, or withdrawals.

a. If a student withdraws from a class after the school-designated “withdrawal period,” the school may still bill the State Operations Finance department for that class. Unless the student can provide clear, incontestable evidence that the course was dropped due to unforeseen circumstances, such as extreme illness or mobilization with less than 30 days’ notice, the student will be required to repay the entire charge for that course to the State of Utah, under the STA program policy guidelines.

b. Students who fail to make satisfactory progress in a course (grade of C or equivalent) or receive an F, E, W, or I (“I” referring to incomplete coursework that was not finished within 120 days) may incur a recoupment of the funds.

c. The member must pay all recoupments before future STA application will be approved. .

11. PERIOD OF AGREEMENT

This SOA will remain in effect for the entire STA FY in which it is signed. A new SOA must be signed each FY the soldier/airman receives UTNG STA.

MEMBER ACKNOWLEDGEMENT AND AGREEMENT

I agree to all the above conditions.

Name (Last, First, MI) Rank/Grade Unit Date

Signature

Address (Street, City, State, Zip)

Phone

Email Address

ANNEX B STATEMENT OF AGREEMENT

STATEMENT OF AGREEMENT (SOA)
STUDENT SCHOOL LOAN REPAYMENT

GUIDELINES

1. AUTHORITY

State Operations Policy 26-01

2. PRIVACY ACT INFORMATION

State Tuition Assistance (STA) forms may include information protected under the Privacy Act 1974. To review and approve STA requests, I authorize STA administrators to forward applicable STA applications and associated forms to my non-military email address.

3. AUTHORIZED RATES

The State of Utah, through the UTNG, may pay up to \$7000 for student loan repayment based on the following requirements:

- a. I agree to submit ALL of my post secondary degrees with my application.
- b. I agree to a commitment of two years to the Utah National Guard eligible for recoupment if the commitment is not fulfilled.
- c. Reimbursements will be paid directly to the loan agency.

4. ELIGIBILITY

- a. _____ I am a Utah National Guard service member in good standing (satisfactory participant) in my unit.
- b. _____ The loan repayment is for my FIRST degree at Associate, Bachelor's, Master's or Doctorate level.
- c. _____ I am NOT applying for the State Tuition Assistance (STA) Program. Members must choose either STA or SSLR each fiscal year.

5. OBLIGATION

I understand that by receiving SSLR, I incur the following obligation. Failure to complete this obligation may result in the recoupment of all or a portion of my SSLR.

- a. _____ I intend to stay in the Utah National Guard for two years beyond my submission date for the loan repayment.

b. _____ If I separate voluntarily or am discharged "for cause" I will be recouped the amount of loan repayment may be recouped by the State of Utah.

6. DIPLOMAS

a. I agree to submit a copy of all of my post secondary diplomas with the submission paperwork.

7. DUPLICATION OF BENEFITS

a. Student School Loan Repayment (SSLR) is authorized in combination with all Federal Loan Repayment Plans.

8. PERIOD OF AGREEMENT

This SOA will remain in effect for the entire State Fiscal Year in which it is signed. A new SOA must be signed each FY the soldier/airman receives SSLR.

MEMBER ACKNOWLEDGEMENT AND AGREEMENT

I agree to all the above conditions.

Name (Last, First, MI) Rank/Grade Unit Date

Signature

Address (Street, City, State, Zip)

Phone

Email Address

▪

ANNEX C STA ETP FOR LATE APPLICATIONS
 The most current version can be found on our public facing website:
<https://guard.utah.gov/education-services/>

PERSONNEL ACTION		
For use of this form, see DA PAM 600-8; the proponent is the DCS, G-1.		
PRIVACY ACT STATEMENT		
AUTHORITY: 10 U.S.C. 7013, Secretary of the Army; DA PAM 600-8, Military Human Resources Management Administrative Procedures. PRINCIPAL PURPOSE: To request or record personnel actions for or by Soldiers in accordance with DA PAM 600-8. NOTE: For additional information see the System of Records Notice A0600-8-104 AHRC. https://dpcld.defense.gov/Portals/49/Documents/Privacy/SORNs/Army/A006-8-104-AHRC.pdf ROUTINE USE(S): There are no specific routine uses anticipated for this form; however it may be subject to a number of proper and necessary routine uses identified in the system of records notice(s) specified in the purpose statement above. DISCLOSURE: Voluntary, however, failure to impart pertinent information may result in a delay or error in processing the request for personnel action.		
SECTION I - PERSONAL IDENTIFICATION		
1. THRU (Include ZIP Code) Commander (Your Unit here) Address 1 Address 2 G1- Education Services Branch	2. TO (Include ZIP Code) G1- Education Services Branch 12953 S Minuteman Drive Draper, UT 84020	3. FROM (Include ZIP Code) Soldier / Unit Address 1 Address 2
4. NAME (Last, First, MI)	5. GRADE OR RANK / PMOS / AOC	6. DOD ID NUMBER
SECTION II - DUTY STATUS CHANGE (AR 600-8-6)		
7. The above Soldier's duty status is changed from _____ to _____ effective _____ hours, _____		
SECTION III - REQUEST FOR PERSONNEL ACTION		
8. I request the following action: (Check as appropriate)		
<input type="checkbox"/> Service School (Enl only)	<input type="checkbox"/> Special Forces Training/Assignment	<input type="checkbox"/> Identification Card
<input type="checkbox"/> ROTC or Reserve Component Duty	<input type="checkbox"/> On-the-Job Training (Enl only)	<input type="checkbox"/> Identification Tags
<input type="checkbox"/> Volunteering For Oversea Service	<input type="checkbox"/> Retesting In Army Personnel Tests	<input type="checkbox"/> Separate Rations
<input type="checkbox"/> Ranger Training	<input type="checkbox"/> Reassignment Married Army Couples	<input type="checkbox"/> Leave - Excess/Advance/Outside CONUS
<input type="checkbox"/> Reassignment Extreme Family Problems	<input type="checkbox"/> Reclassification	<input type="checkbox"/> Change of Name/SSN/DOB
<input type="checkbox"/> Exchange Reassignment (Enl only)	<input type="checkbox"/> Officer Candidate School	<input checked="" type="checkbox"/> Other (Specify): ETP for late STA Submission
<input type="checkbox"/> Airborne Training	<input type="checkbox"/> Asgmt of Pers with Exceptional Family Members	
9. SIGNATURE OF SOLDIER (When required)		10. DATE (YYYYMMDD)
SECTION IV - REMARKS (Applies to Sections II, III, and V)		
1. I request an state tuition assistance exception to policy for late submission. 2. I understand that I had up to 90 days but no less than 8 days from the class start date to apply. 3. I understand that this exception, if granted, is a one-time action and further exception requests will constitute a pattern of procrastination and will not be approved. 4. The reason for my late submission is: ***ONLY RECOMMEND APPROVAL BLOCK can be 'checked' in block 11 before signature and forwarding through channels*** ***MUST be signed by Company Commander at the bottom of this page, block 12 and date in block 14***		
SECTION V - CERTIFICATION / APPROVAL / DISAPPROVAL		
11. I certify that the duty status change (Section II) or that the request for personnel action (Section III) contained herein -		
<input type="checkbox"/> HAS BEEN VERIFIED <input checked="" type="checkbox"/> RECOMMEND APPROVAL <input type="checkbox"/> RECOMMEND DISAPPROVAL <input type="checkbox"/> IS APPROVED <input type="checkbox"/> IS DISAPPROVED		
12. COMMANDER / AUTHORIZED REPRESENTATIVE	13. SIGNATURE	14. DATE (YYYYMMDD)

ANNEX D STW APPLICATION

The most current version can be found on our public facing website:

<https://guard.utah.gov/education-services/>

THIS INFORMATION IS SUBJECT TO THE PRIVACY ACT OF 1974

**Application for Utah National Guard
STATE TUITION WAIVER**

I. TUITION AWARD: Equivalent to the cost of full-time tuition (12-18 credit hours) for the academic school year.

II. ELIGIBILITY: Utah National Guard members who:

- 1) have been accepted as a student at a Utah state public College or University for the next school year starting in the fall
- 2) will be attending school as a full-time student
- 3) are MOS/AFSC qualified (except Cadets)
- 4) do not have a 4-year degree
- 5) are not on Active Duty (AGR/ADOS) (some exceptions)
- 6) are considered Utah residents by the school they will be attending
- 7) have an ETS that extends at least two years past the end of the academic school year

III. APPLICATION PACKET MUST INCLUDE:

- a) Application for the Utah National Guard State Tuition Waiver
- b) Form or memorandum signed by Professor of Military Science (PMS) or Assistant PMS verifying that the Cadet does not have a scholarship for tuition (Cadets only)
- c) Short Essay (less than two pages, typed, double-spaced) highlighting what your educational goals and future plans are as related to your program of study.
- d) Copy of prior school transcripts showing Overall Cumulative Grade Point Average (GPA) (Check applicable block and provide required transcripts).

- Beginning freshman: Submit a copy of your high school transcript
- Continuing college student: List all schools attended, start with most recent first and provide unofficial transcripts for each

	Transcript attached <input type="checkbox"/>
	Transcript attached <input type="checkbox"/>
	Transcript attached <input type="checkbox"/>
	Transcript attached <input type="checkbox"/>

e) Mark one of the following boxes. Only mark the Fall/Spring semester boxes if you are graduating this year and will not need the waiver for the full year.

- Full school year
- Fall semester
- Spring semester

IV. APPLICATION DEADLINE: Application packet must be submitted by email no later than **30 April**. Email the completed packet to ng.ut.utarmg.mbx.education-office@army.mil. If necessary packets/transcripts may be mailed to G1 Education Services Office 12953 S. Minuteman Dr. Draper UT 84020.

APPLICANTS MUST COMPLETE ITEMS 1 THROUGH 12

1. Applicant's Name (Last, First, MI)	2. Email address:	3. Phone Number:
4. Name of school you will be attending:	5. Student ID (if applicable):	6. Are you a scholarship cadet or an SMP with no requirement to complete AIT?
7. Army or Air National Guard?	8. Name of your military unit?	9. Current ETS

10. STUDENT CERTIFICATION

- I am MOS/AFSC qualified (or a CDT or SMP) Initial
- I am not on active duty (ADSW, AGR) or have an ETP Initial
- I am considered an in-state resident by my college/university Initial
- I do not have a 4-year degree Initial
- I will be attending school full-time Initial

11. Signature	12. Date
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