

## Tuition Assistance (TA) Account Request Wizard

### General Information

You may request to have TA permissions granted to your GoArmyEd account. TA permissions enable you to request TA benefits through GoArmyEd.

The TA Account Request Wizard includes six steps. Each completed step will be marked with a green checkmark. When you complete these steps and submit the request for approval, it will take approximately two (2) business days for an Army Education Counselor to grant you permission to request TA benefits through GoArmyEd. You will be notified by email if your request is approved or if further action is needed prior to approval being granted.

Below are TA Request Wizard steps:

Step 1: TA benefits verification

Step 2: View and acknowledge training

Step 3: Decide on a home school and educational goal/degree plan

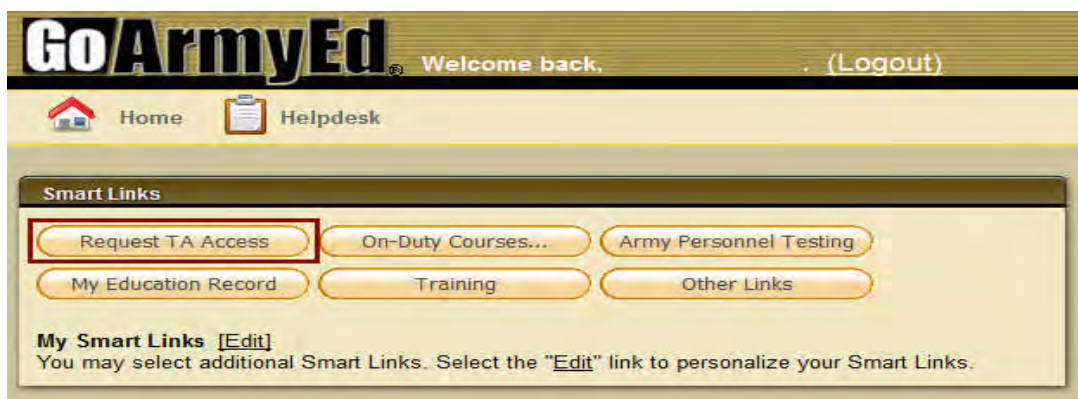
Step 4: Initiate and submit a Common Application

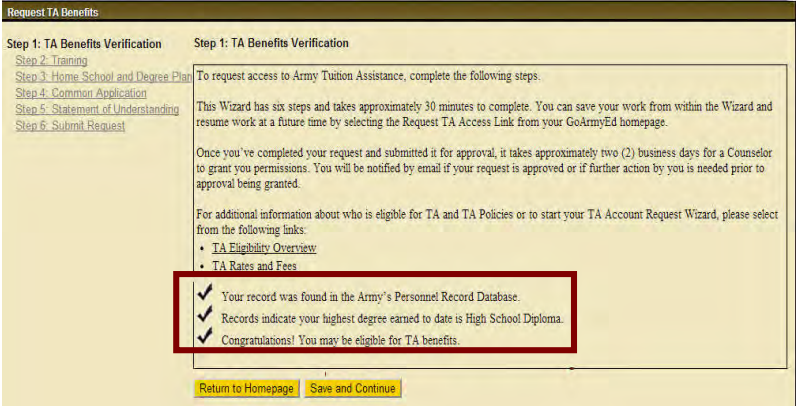
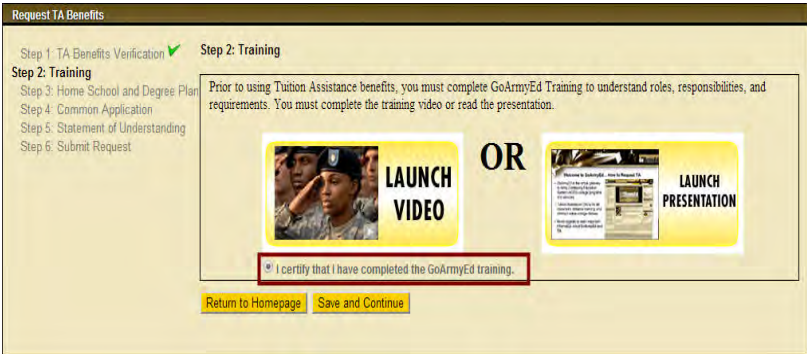
Step 5: Acknowledge the Tuition Assistance (TA) Statement of Understanding (SOU)

Step 6: Submit the request for approval

Select **"Request TA Access"** button to complete the TA Request Wizard before using TA through GoArmyEd

- After the steps are completed, a case is created and escalated to the your education center
- An Army Education Counselor will take approximately two business days to review the case
- Soldiers receive an email if the request is approved or if further action is required



TA Wizard Steps	
<p><b>IMPORTANT:</b> Select the <b>“Save and Continue”</b> button as you work thru the steps. If you decide to return to homepage without saving, the information will not be saved.</p>	
<p><b>Step 1: TA Benefits Verification</b></p> <p>Review information relating to TA benefits and access links to TA policies. If you receive a message stating you may be eligible for TA benefits, you can continue to the next step in the TA Account Request Wizard.</p> <p><b>Note:</b> In some instances you may receive a message stating you are not able to request TA and may need to check your personnel record. You may create a helpdesk case for further assistance.</p> <p>Select the <b>“Save and Continue”</b> button to proceed to Step 2: Training</p>	
<p><b>Step 2: Training</b></p> <p>Prior to using Tuition Assistance benefits, You must complete the training video or read the presentation to understand your roles, responsibilities and requirements for using this benefit.</p> <p>You must select the radio button to certify you have completed the GoArmyEd training before proceeding to Step 3.</p> <p>Select the <b>“Save and Continue”</b> button to proceed to Step 3: Home School and Degree Plan.</p>	





## Step 4: Common Application

You must complete the four sections of the Common Application, which provides your school key information and will assist your Army Education Counselor in advising you.

- Contact Information
- Demographic Information
- Prior Education
- Additional Information

Select the **“Save and Continue”** button to proceed to next tab of the Common Application.

A red X will appear next to the Common Application section to alert you when information is incomplete.



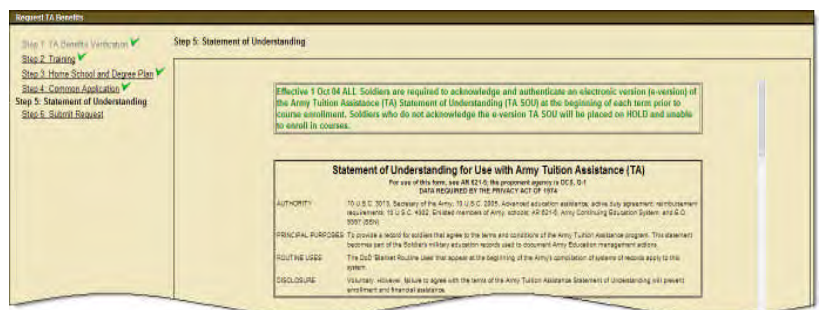
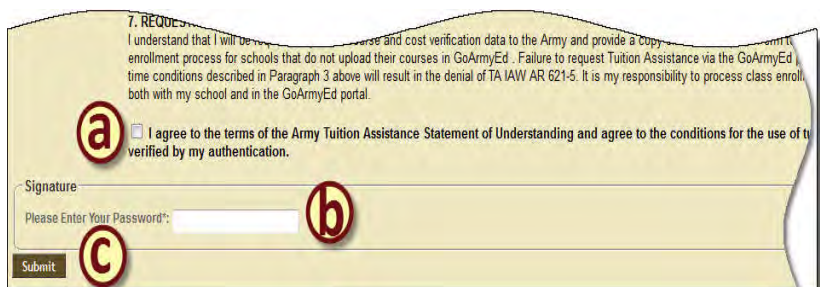

## Step 5: Statement of Understanding

You must submit a TA SOU. The Tuition Assistance (TA) Statement of Understanding (SOU) should be carefully reviewed.

a) You must agree to the terms by selecting the checkbox next to the statement that you understand the terms of the TA SOU.

b) Enter your GoArmyEd password in the **“Password”** field.

c) Select the **“Submit”** button.

## STEP 6: Submit Request

Verify the accuracy of all information in previous steps before selecting the **“Submit For Approval”** button.

GoArmyEd creates a case on your behalf that is submitted to an Army Education Counselor for review. You will receive email notification advising when your request is approved. If it was rejected you will receive an email with a reason why and instructions for resolving the issues.

After your request is approved, you may log into GoArmyEd to begin requesting TA benefits for your classes.


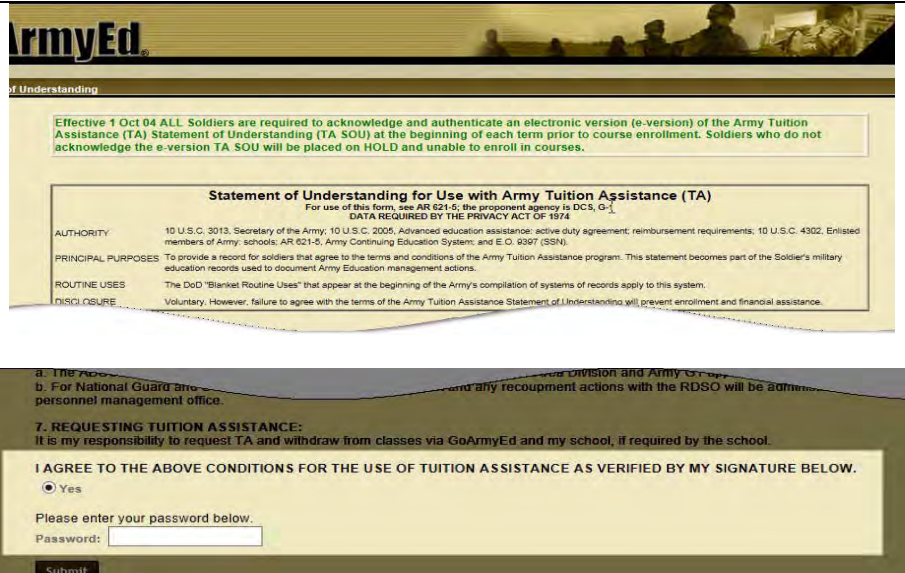


The screenshots show the 'Request TA Benefits' wizard at Step 6: Submit Request. The first screenshot shows the 'Submit for Approval' button highlighted. The second screenshot shows a confirmation message: 'You have successfully completed the TA Account Request Wizard. Your Statement of Understanding has been submitted to your Commander for approval.' The third screenshot shows a confirmation message: 'You have successfully completed the TA Account Request Wizard. Your request has been submitted to an Army Education Counselor for review and approval. A case has been created on your behalf. The case number is 3150136. You can track the status of your request from the Track Helpdesk Case(s) on your homepage. You will receive an automated email when your account request has been approved or denied. If your account request is denied, your email will include a reason and instructions for resolving any issues with your request. If your account is approved, you will be able to log into GoArmyEd with your username and password and may be able to start using TA benefits. However, if there are issues with your Army personnel record your GoArmyEd account will be placed on hold and you will receive specific instructions about how to address the hold. Holds prevent Soldiers from using TA benefits until they are resolved.'

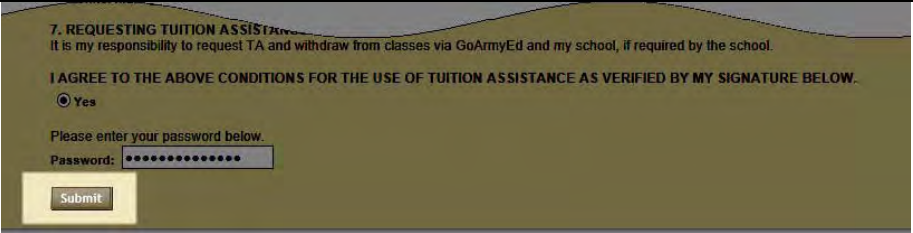
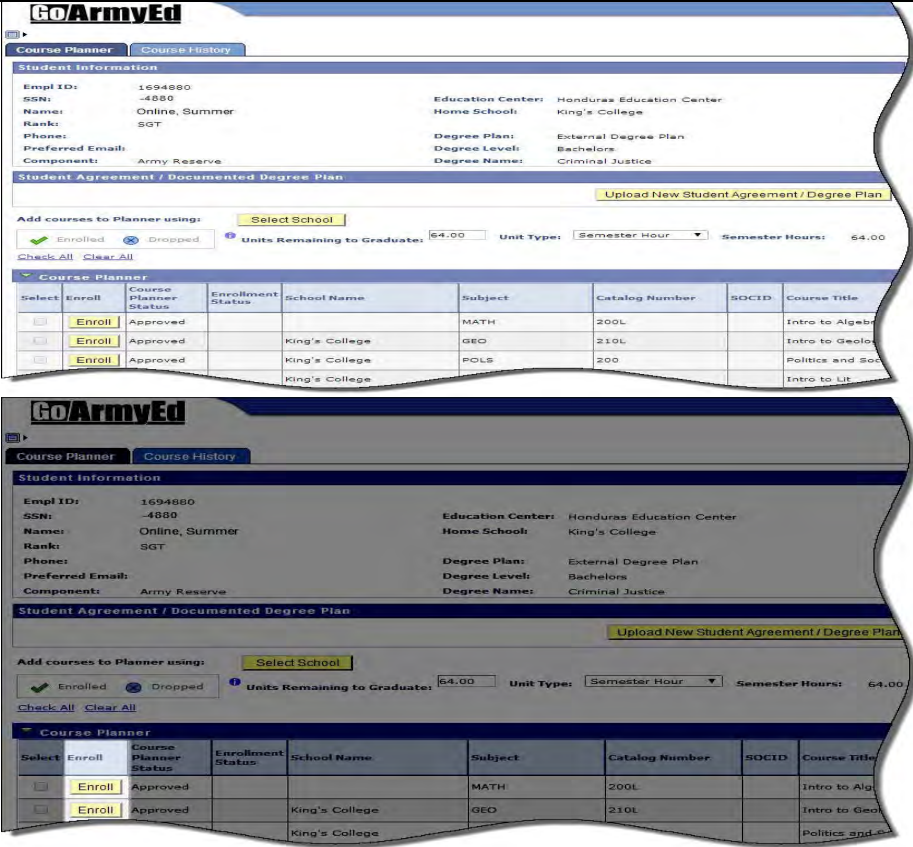


## How to Enroll into Classes Using the Course Planner

This document explains how to enroll into classes using the Course Planner.

Step	Screenshot
<p>1. From your GoArmyEd homepage, select the “<b>Course Planner</b>” button in the Smart Links section.</p> <p><b>IMPORTANT:</b> Course Planner is required when you have completed six semester hours at your home school or nine semester hours at any school. If you select “<b>Request TA</b>” Smart Link, when the Course Planner is required of you, the Course Planner page will appear.</p>	
<p>2. Review the Quarterly Tuition Assistance Statement of Understanding if it appears.</p> <p>Scroll down the screen and select the radio button to acknowledge that you agree to the terms of the Statement of Understanding when using Tuition Assistance.</p> <p>Enter your GoArmyEd password in the “<b>Password</b>” field.</p>	




	<p>Select the <b>“Submit”</b> button to proceed to Course Planner.</p>	
3.	<p>The Course Planner screen appears.</p> <p>Select the <b>“Enroll”</b> button next to the desired course to enroll in the class through GoArmyEd.</p>	


4. Depending if your school uploaded courses, you will automatically be directed to one of the following paths.

### PATH 1

**If the Course Planner/Search Results screen appears.**




Select the **“Enroll”** button next to the desired course to enroll in the class.

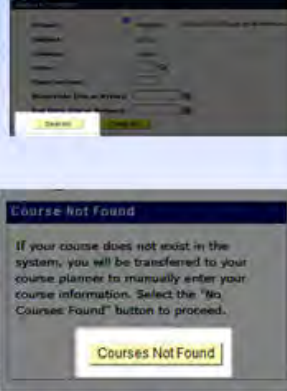


### PATH 2

**If the Non-LOI Class Search screen Appears.**



Select the **“Search”** button to view available class sections for the course.




If a desired course is not listed select the **“Course Not Found”** button.

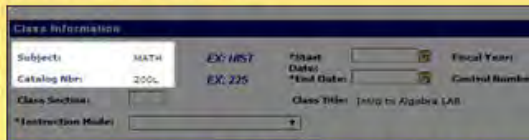
The Course Planner screen appears, follow the steps in Path 3 to the right of this page.

### PATH 3

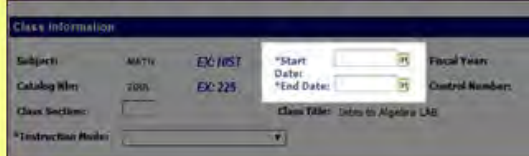
**If the Request TA screen appears, read the instructions carefully for each section. The Student and School information sections are pre-populated with your information.**



Scroll to the Class Information section, the **“Subject”** and **“Catalog Nbr”** fields are pre-populated with the subject and catalog number entered in Course Planner.



Enter the start and end date into the **“Start Date”** and **“End Date”** fields.





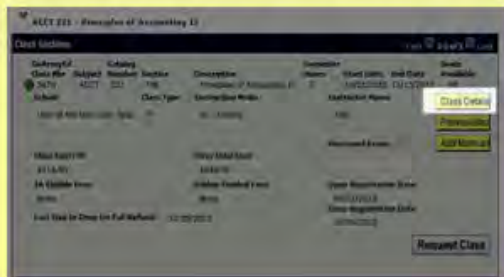
5.

### PATH 1 (continued)

The Search Results screen displays classes for the course you selected.

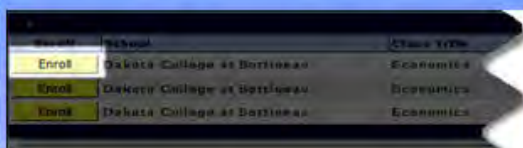


Select the **“Class Details”** button to view specific and important information for that class section.



### PATH 2 (continued)

If your search returns the class you would like to enroll in select **“Enroll.”**



A message appears warning that this enrollment is provisional.

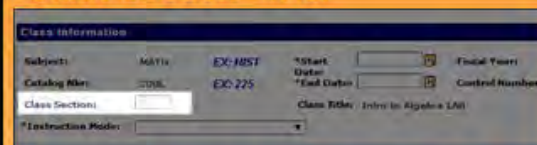


The **Request TA** screen appears. Read the instructions carefully for each section.

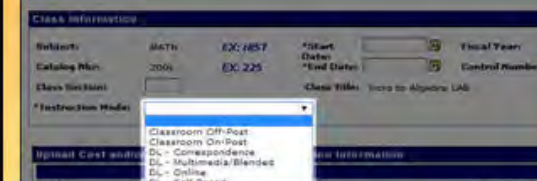


### PATH 3 (continued)

Enter in the class section into the **“Class Section”** field.



Select the drop-down arrow in the **“Instruction Mode”** field to choose the mode the class is offered.



Scroll to the **Upload Cost and/or Course Enrollment Verification Information** section to upload required documentation of the cost of your tuition and fees in this section. Select the **“Cost Verification Information and Example”** link to view information required.

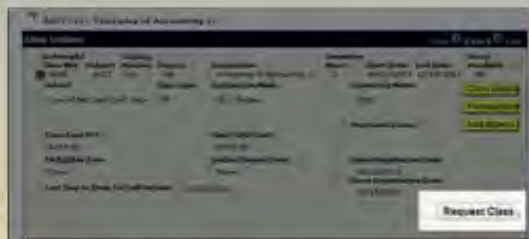




6.

### PATH 1 (continued)

Select the **"Request Class"** button from either the Class Details or Class Sections screen to enroll in that section.



A pop-up message appears advising the enrollment is provisional and will be under review to ensure that it conforms to all TA policies and semester hour limits. If the enrollment goes over the semester hour limit, the enrollment will be rejected.

Select the **"OK"** button to proceed.



### PATH 2 (continued)

The sections are pre-populated with your information. Scroll to the **Class Information** section, and review that all of the information is correct about the class you are wishing to enrolling into.



Scroll to the **Upload Cost and/or Course Enrollment Verification Information** section. Even though your school has uploaded TA rates, you are required to upload documentation of the cost of your tuition and fees. Select the **"Cost Verification Information and Example"** link to view information required.



### PATH 3 (continued)

Enter a Title and description of the document in the **"Title"** and **"Description"** fields.



You can upload the Cost Verification document one of two ways: Either directly from your computer by selecting the **"Add Attachment"** button; **Or** upload the document to eFile so it appears when you select the **"Search eFile"** button.



For further assistance, view the training video titled **"How to upload a document to eFile."** Select the transaction type **"Cost Verification and Course Schedule"** when using eFile to upload your document.



7.

### PATH 1 (continued)

A second pop-up message appears stating the request is subject to availability of funds. If funds are not allocated for this fiscal year before the class start date, your request will be rejected and the class will be dropped.

Select the **"OK"** button to proceed.



The Confirm classes screen appears.

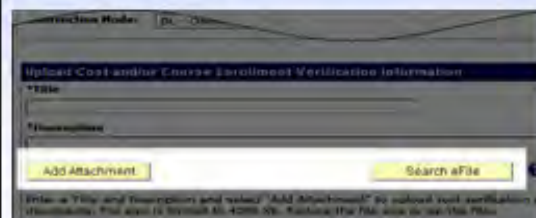


### PATH 2 (continued)

Enter a title and description of the document in the **"Title"** and **"Description"** fields.



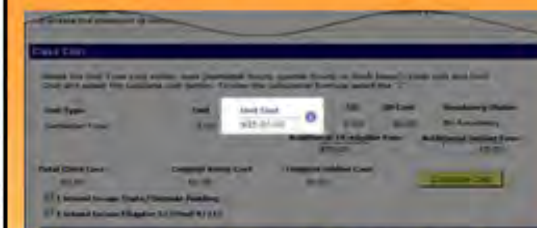
You can upload the Cost Verification document one of two ways: Either directly from your computer by selecting the **"Add Attachment"** button; **Or** upload the document to eFile so it appears when you select the **"Search eFile"** button.



For further assistance, view the training video titled **"How to upload a document to eFile."** Select the transaction type **"Cost Verification and Course Schedule"** when using eFile to upload your document.

### PATH 3 (continued)

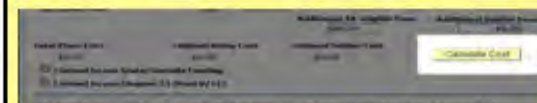
Scroll to the **Class Cost** section enter in the unit cost in the **"Unit Cost"** field.



If there are additional TA eligible fees include those in the **"Additional TA-eligible Fees"** field. Also, if there are additional Soldier fees include those fees in the **"Additional Soldier Fees"** field.



Select the **"Calculate Cost"** button.

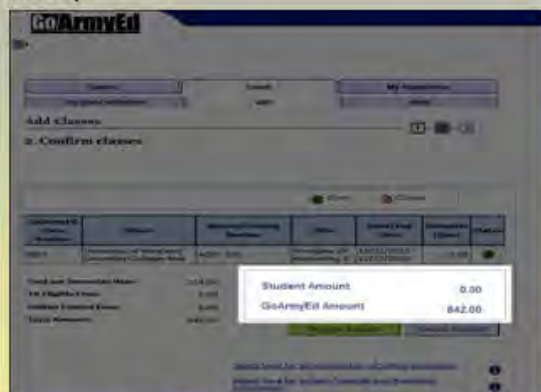




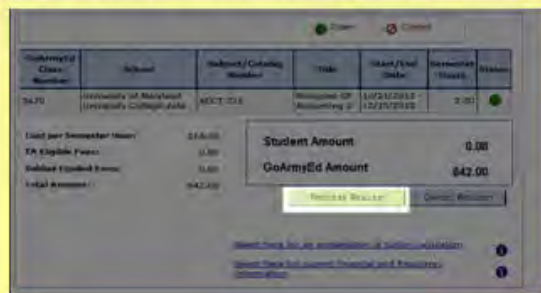
8.

## PATH 1 (continued)

Review the class cost covered by TA (in the “GoArmyEd Amount” field) and any class cost you must pay yourself (in the “Student Amount” field).



Select the “Process Request” button to proceed with enrolling in the class.

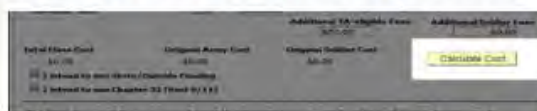


## PATH 2 (continued)

Scroll to the **Class Cost** section. The Unit cost is pre-populated. If there are additional TA eligible fees include those in the “Additional TA-eligible Fees” field. Also, if there are additional Soldier fees include those fees in the “Additional Soldier Fees” field.

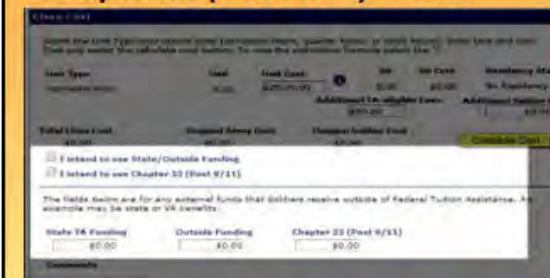


Select the “Calculate Cost” button.



## PATH 3 (continued)

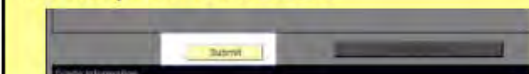
If you intend to use State/Outside Funding or Chapter 33 (Post 9/11) funds, outside of federal TA select the appropriate radio buttons. Enter the applicable amounts in the “State TA Funding,” “Outside Funding,” or “Chapter 33 (Post 9/11)” fields.



A message appears stating TA amount may be adjusted based on the approved class level. Select the “OK” button.



Select the “Submit” button to submit TA Request for review.





9.

### PATH 1 (continued)

If an amount is not covered by TA, a warning message appears in red with the reason. The amount is listed in the **"YOU MUST PAY"** field. You will owe the amount to the school.

The following is an example of the message:



**WARNING: YOU MUST PAY!**

Items added exceed allowance (TA) limit. TA grants cover average \$1000 per semester. If you have selected more than \$1000 in classes, you must pay the difference.

For example, if you have \$1000 in TA and you select \$1200 in classes, you must pay the difference of \$200.

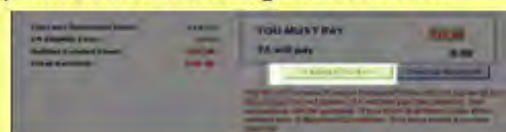
Class	Cost	TA Allowance	YOU MUST PAY
GoArmyEd - Basic Training	\$100.00	\$100.00	\$0.00
GoArmyEd - Basic Training	\$100.00	\$100.00	\$0.00
GoArmyEd - Basic Training	\$100.00	\$100.00	\$0.00
<b>Total</b>	<b>\$300.00</b>	<b>\$100.00</b>	<b>\$200.00</b>

**YOU MUST PAY \$21.92**

TA will pay \$0.00

**Total \$21.92**

Select the **"I Agree to pay"** button to proceed on enrolling in the class.



**YOU MUST PAY \$21.92**

TA will pay \$0.00

**Total \$21.92**

### PATH 2 (continued)

If you intend to use State/Outside Funding or Chapter 33 (Post 9/11) funds, outside of federal TA select the appropriate radio buttons. Enter the applicable amounts in the **"State TA Funding," "Outside Funding,"** or **"Chapter 33 (Post 9/11)"** fields.



**Class Cost**

Select the radio button that best describes your funding source. If you select 'State TA Funding', you must enter the amount in the 'State TA Funding' field. If you select 'Outside Funding', you must enter the amount in the 'Outside Funding' field. If you select 'Chapter 33 (Post 9/11)', you must enter the amount in the 'Chapter 33 (Post 9/11)' field.

☒ I intend to use State/Outside Funding

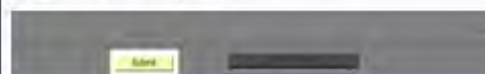
☐ I intend to use Chapter 33 (Post 9/11)

The fields below are for any external funds that Soldiers receive outside of Federal Tuition Assistance. An example may be state or VA benefits.

State TA Funding: \$0.00 Outside Funding: \$0.00 Chapter 33 (Post 9/11): \$0.00

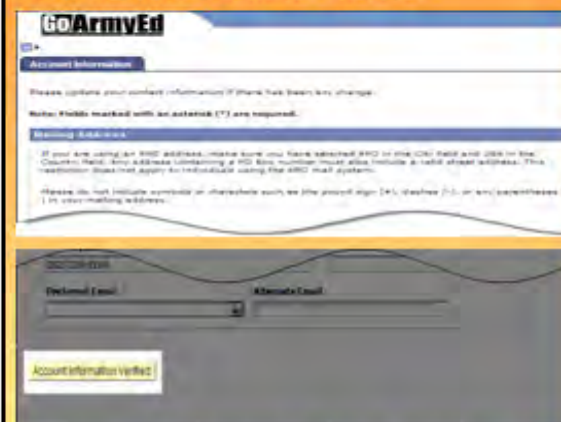
**Total Class Cost: \$0.00**

Select the **"Submit"** button to submit your TA Request.



### PATH 3 (continued)

The Account Information screen appears. Review the information and update any fields if applicable. Select the **"Account Information Verified"** button.



**GoArmyEd**

**Account Information**

Please update your contact information if there have been any changes.

Fields marked with an asterisk (\*) are required.

**Account Information Verified**

A message appears stating your request has been submitted. When your TA Request Form has been reviewed, you will be notified by email letting you know if the request was approved or rejected. Select the **"OK"** button.



**Message**

Your request has been submitted for review and you will be notified of its status through email (25000 358)



10.

### PATH 1 (continued)

The Account Information screen appears. Review the information and update any fields if applicable. Select the **"Account Information Verified"** button.



A screen appears stating the class has been added to your schedule and a green checkmark appears in the Status column.



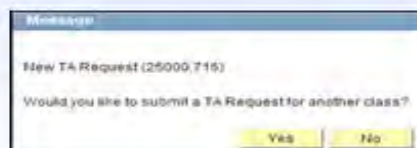
### PATH 2 (continued)

A message appears stating your Request has been submitted. When your TA Request Form has been reviewed, you will be notified by email letting you know if the request was approved or denied.

Select the **"OK"** button.



If you want to submit an additional Request Tuition Assistance Form, select the **"Yes"** button. If not select the **"No"** button to return to Course Planner.

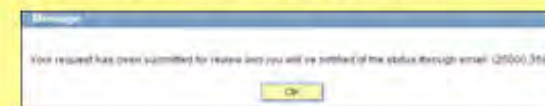


### PATH 3 (continued)

The Account Information screen appears. Review the information and update any fields if applicable. Select the **"Account Information Verified"** button.



A message appears stating your request has been submitted. When your tuition TA Request Form has been reviewed, you will be notified by email letting you know if the request was approved or rejected. Select the **"OK"** button.





### PATH 1 (continued)

The class enrollment will be submitted to your school. You will receive an email confirming that your enrollment Request was successful or if the request is not accepted by your school, you will receive a follow-up email with an explanation.

Course Planner will reflect the current Enrollment Status for the enrolled class you processed.

The screenshot shows the 'Add courses to Planner' interface. At the top, there are tabs for 'Enrollment Status' (selected), 'Add to Planner', 'Add to Favorites', 'Add to Watchlist', and 'Add to Calendar'. Below the tabs, there is a search bar and a 'Filter' button. The main table lists courses with columns: 'Add to Planner', 'Enrollment Status', 'Add to Favorites', 'Add to Watchlist', 'Add to Calendar', 'Course Title', and 'Course ID'. The first three courses have green checkmarks in the 'Enrollment Status' column, indicating they are available for enrollment. The first course, 'Introduction to African American Studies', is highlighted with a yellow background.

Add to Planner	Enrollment Status	Add to Favorites	Add to Watchlist	Add to Calendar	Course Title	Course ID
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Introduction to African American Studies	101
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Introduction to Sociology	102
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Introduction to Psychology	103
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Introduction to African American Studies	104

## PATH 2 (continued)

Course Planner will reflect the Enrollment Status of Enrolled with a green check mark.

[illegible]

### PATH 3 (continued)

Another message appears stating Changes to Army Cost will be reflected on your TA Details screen within one hour. Select the "OK" button.


**Messages**

Soldiers TA Detail page (25000.653)

Note: All changes to Army Cost will be reflected on a Soldiers TA Detail page within one hour of the update.

OK

If you want to submit an additional Request Tuition Assistance Form, select the **“Yes”** button. If not select the **“No”** button to return to Course Planner.



Messenger

New TA Request (25000.716)

Would you like to submit a TA Request for another class?

Yes No

Course Planner will reflect the Enrollment Status of Enrolled with a green check mark.

Add records to Release group: **Search Results**

☒ Approved ☐ Withdrawn **Public Reasoning for Rejection** **OK** **Back** **Cancel** **Download Results**


Details View

1 of 1

Select	Event	Release Group	Approval Status	Release Status	Release	Category Number	ICD10	Event Title
<input type="checkbox"/>	Approved				North Carolina State University Raleigh	800	435	Ecology 100

**Event** **Approved** **Withdrawn** **Public Reasoning for Rejection** **OK** **Back** **Cancel** **Download Results**



12.	Select the “ <b>Close Window</b> ” link to return to your GoArmyEd homepage.	
13.	<p style="text-align: center;"><b>Frequently Asked Questions</b></p> <p><b>Q: Am I required to enroll into classes through Course Planner after my Course Planner is approved?</b></p> <p>A: Yes, in order for you to use eligible TA benefits you must enroll in classes through your approved Course Planner. If you followed Path 1, your enrollment is sent to your school by GoArmyEd in an overnight file. If you followed Path 2 or 3, once your TA Request is approved, you must enroll in the class directly with your school and provide the approved TA Request form.</p> <p><b>Q: Am I required to enroll into all my classes on Course Planner at once?</b></p> <p>A: No, the Course Planner tool is used to track your academic progress. Over time you will enroll in classes as your schedule and work load permits. You can take up to 16 semester hours of TA-funded courses per fiscal year.</p> <p><b>Q: Am I able to edit my classes in Course Planner?</b></p> <p>A: Yes, if courses are in <b>Pending</b> status, you are able to make edits on the Course Planner.</p> <p><b>Q: Can I change my course listings once they are approved in Course Planner?</b></p> <p>A: If you change your degree or home school you will need to submit a new Course Planner for approval.</p>	



(UNCLASSIFIED)

## INFORMATION PAPER

AHRC-PDE  
28 January 2013

SUBJECT: Documented Degree Plans and Servicemembers Opportunity Colleges Army Degrees (SOCAD) Student Agreements (SA)

1. Purpose: To provide guidance to Army Continuing Education System (ACES) personnel on documented degree plans and student agreements.

2. Facts:

a. A documented degree plan and SOCAD SA include four items: 1) Soldier's name, 2) listing of all of the requirements for degree completion, 3) evaluation of transcripts, to include military training and college credits previously earned and 4) endorsement by the school (hand-written or digital signature of a school official OR degree plan generated directly from the school's online automated degree audit system). Note: Planning worksheets and online student degree planners only become documented degree plans when they include the above four requirements.

b. A Soldier becomes eligible for a documented degree plan or SOCAD SA after completing six (6) semester hours at the home school (AR 621-5); or within 60 days of admission and when all transcripts have been provided (applies to schools that signed DoDI 1322.25, 15 March 2011 or DoDI 1322.25, 6 December 2012, Change 1).

c. It is each Soldier's responsibility to request a documented degree plan and to provide all required documents, such as transcripts, to the home college in a timely manner. A school may decline to complete a formal evaluation if it has not received all of the required documents. Army Education Counselors may defer Student Agreement Holds in GoArmyEd after careful consideration of reasons for deferral.

d. Letter of Instruction (LOI) schools receive a weekly report indicating when student agreements are due and have established a systematic process to ensure that Soldiers receive their SOCAD SA in a timely fashion. For Soldiers in fully developed degree plans, schools submit the student agreement file electronically and approval of an Army Education Counselor is not required.

e. Documented degree plans for LOI drop-down degrees and Non-LOI schools are issued in a paper form. The Soldier is responsible for uploading the degree plan to eFile. Army Education Counselors must review and approve documented degree plans.

  
Ela Karczewska/502-613-8607  
Approved by: Dr. Pamela L. Raymer

(UNCLASSIFIED)

## Request for TA Recoupment Waiver – Withdrawal for Military (WM) Reasons

FROM: Headquarters Army Continuing Education System (HQ ACES)

TO: Battalion Commander/First LTC/Reserve Component Commander

SUBJECT: Waiver of TA Recoupment for College Course Withdrawal due to Military Reasons

1. Purpose: To provide documentation IAW AR 621-5 to verify non-completion of Tuition Assistance (TA) funded course(s) due to military reasons.
2. The approval authority for a waiver of TA recoupment is the installation or state ESO, or RSC ESS. A WM request for recoupment waiver must be endorsed by the Soldier's Battalion Commander, or first LTC in the chain of command, or Unit Commander if in the Reserve Component, based on the following reasons: **Unanticipated/Unscheduled** Military Duties or Deployment, Separation from Service, Emergency Leave (includes death in the family), Illness/Hospitalization, etc.
3. IAW AR 621-5, this Soldier is requesting your review and endorsement for a TA Recoupment Waiver - Withdrawal for Military (WM) Reasons:

Last Name	First Name	Rank	Last 4 of SSN	Signature/Date
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For the following college course(s):

School	Course#	Course Title	Start Date	End Date	Cost

4. Provide details of the reason for the unanticipated/unscheduled withdrawal, **to include dates** of the events below. Provide a separate sheet if additional space is needed:

5. Information concerning payment of the TA debt was sent to the Soldier. An approved request form must be posted to e-File in the Soldier's GoArmyEd record within 60 days after the withdrawal and must be approved by an Education Services Officer (ESO) to cancel the debt. Non-response or disapproval will result in recoupment of TA funds. If recoupment is initiated, Soldiers will have a 30-day due diligence notice of TA debt collection.

6. I recommend approval of this TA Recoupment Waiver: **YES** \_\_\_\_\_ **NO** \_\_\_\_\_

Rank/ Printed Name	Signature	Date
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Unit	Phone	Email
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The following is an example of all the information the  
Cost Verification Documentation must include.  
( Most fees are not TA eligible)

School name  
must appear

# SAMPLE UNIVERSITY

Your name/  
address  
must appear

Joe Online  
123 Tank Trail Road  
Jefferson, TX 78711  
Invoice # 111222W120

Class start dates and  
credits must be listed

## Invoice Statement Winter Term

<u>Class</u>	<u>Grade</u>	<u>Term Dates</u>	<u>Credits</u>	<u>Cost Per Credit</u>	<u>Total Amount</u>
ACT 300 Principles of Financial Accounting	Enrolled	2/4/13 - 3/31/13	3	\$250.00	\$750.00
ITS 315 Intro to Networks	Enrolled	2/4/13 - 3/31/13	3	\$250.00	\$750.00
ITS 310 LabSim Fee					\$59.00
Fitness and Recreation Fee					\$75.00
ID Fee					\$11.00
Student Service Fee					\$232.00
Medical Service Fee					\$43.00
Total			6		\$1,920.00

Tuition and  
fees must  
be listed  
separately

If you need further assistance please contact me at [MilitaryTA@SampleU.edu](mailto:MilitaryTA@SampleU.edu).

Mail Payments To:  
SU-Student Accounts  
100 E. Dogwood Ave, Suite 100  
Greenwood Village, CO 82222