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Phoenix, Arizona

***DEMA Pamphlet 40-04**
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Human Resources
State Tuition Reimbursement

By Order of the Adjutant General:

Official:

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The Adjutant General

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History. This publication is a major revision. Reorganization of the existing Arizona National Guard PAM 621-300 into Department of Emergency and Military Affairs (DEMA) Pamphlet, including procedures for DEMA employee program use, and revision of eligibility criteria.

Applicability. This pamphlet applies to members of the Arizona National Guard (AZNG) regardless of duty status, spouses and legal dependents of an AZNG service member, and DEMA State employees. This pamphlet does not create a contract for employment between any DEMA State employee and the Department. Nothing in the policy changes the fact that all uncovered State employees of the Department are at will employees and serve at the pleasure of the appointing authority.

Proponent and exception authority. The proponent of this pamphlet is the Adjutant General, Director of Emergency Management and Military Affairs. The proponent has the authority to approve exceptions or waivers to this pamphlet that are consistent with controlling law and regulations. The proponent may delegate this approval authority, in writing, to a division chief within the proponent agency or its direct reporting unit or field operating agency, in the grade of colonel or the civilian equivalent. Activities may request a waiver to this pamphlet by providing justification that includes a full analysis of the expected benefits and must include formal review by the activity's senior legal officer. All waiver requests will be endorsed by the commander or senior leader of the requesting activity and forwarded through their higher headquarters to the policy proponent.

Suggested improvements. Users are invited to send comments and suggested improvements directly to the Education Services Office via email at ng.az.azarng.list.g1-education@army.mil or in person at Building 5710 at 5636 E. McDowell Road, Phoenix, AZ 85008.

Distribution. Distribution of this publication is available in electronic media only and is intended for command level of the Department of Emergency and Military Affairs.

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Chapter 1 General Information

1-1. Purpose

This pamphlet provides guidelines, procedures, and limitations of the State Tuition Reimbursement (STR) program for eligible AZNG members, their spouses and dependents, and state employees of DEMA in accordance with the statutes of the State of Arizona and Federal Law.

1-2. Availability of Funds

The STR program is an incentive, not an entitlement. Reimbursement of STR claims is contingent on funding availability as provided in the annual legislative appropriation for this program. Claims made in excess of available funds will not be paid.

1-3. Approved Courses/Schools

Courses must be taken from the following schools to qualify for STR:

- a. Schools recognized by the board, departments, and agencies of the State of Arizona, the Department of Veterans Affairs, and ArmyIgnitED as being a valid educational institution. A partial list of resources is provided in 1-3.e.
- b. Educational institutions as specifically approved by the Department of Emergency and Military Affairs.
- c. Vocational/technical school courses must prepare an individual for a certificate of completion or diploma in a particular chosen vocation to be recognized for the purposes of reimbursement. Courses that do not produce skills sought in the job market, i.e., those which are typically hobbyist in nature, or for the purpose of self-improvement, will not be approved for reimbursement. Validity of these courses will be determined by the Education Services Office and sent to the STR Board, with final approval lying with the Adjutant General.
- d. The Adjutant General, at his/her discretion, may convene a panel (STR Board) to address questionable courses.
- e. Resources:
 - (1) Veteran Affairs GI Bill Comparison Tool (<https://www.va.gov/education/gi-bill-comparison-tool>)
 - (2) American Council on Education Directory (<https://acememberdirectory.azurewebsites.net/>)
 - (3) ArmyIgnitED Institution Search (<https://www.armyignited.army.mil> CAC Required)
 - (4) Army Credentialing Opportunities On-Line (COOL) (<https://www.cool.osd.mil/army/index.html>)
 - (5) Arizona Boards and Commissions List (<https://bc.azgovernor.gov/bc/boards-and-commissions-list>)

Chapter 2 Administrative Limitations

2-1. Maximum Reimbursement

- a. The maximum amount of STR available per DEMA employee or National Guard member is the amount expended for tuition and fees related to the eligible course, up to a maximum of two hundred and fifty dollars (\$250) per semester hour and an annual maximum of five thousand, two hundred and fifty dollars (\$5,250) per state fiscal year (1 July – 30 June), unless previously approved by the AZ ARNG Deputy Chief of Staff (G-1), the AZ ANG Deputy Chief of Staff (A-1) for National Guard members and their spouses and dependents, or the State Human Resources Officer for DEMA state employees.
- b. National Guard members may transfer up to five thousand, two hundred, and fifty dollars (\$5,250) of STR funds to their eligible spouse and dependents. Once transferred, members may use any remaining portion on their own tuition and fees, up to the annual maximum, but this may not exceed the total amount of \$5,250 between member and dependents.

2-2. Employer/Federal Tuition Assistance (FTA)

Pursuant to the expressed intention of legislative committees and a substantiation opinion from the Attorney General of Arizona, an applicant receiving educational reimbursement from their employer or using or eligible for FTA will not be eligible to receive STR unless the amount of tuition exceeds that received from the employer or FTA. STR may make up the difference, not to exceed the maximum allowable STR.

2-3. GI Bill

STR will not reimburse for the tuition or fees paid by the Chapter 33 GI Bill (Post-9/11). STR may make up the difference if the cost of tuition or applicable fees is more than the Post-9/11 will cover, not to exceed the allowable STR.

2-4. State Employee Limitations (DEMA)

Payment for tuition assistance will be coordinated with any other external education benefits for which the employee may be eligible. Employees eligible for veteran's educational assistance, federal or state scholarships, and private scholarships or grants may receive tuition assistance payment from DEMAs only if outside benefits and/or scholarships/grants are not paid or are insufficient to cover the full cost of the educational or career development course(s).

2-5. Other Limitation

Applicant will not be reimbursed for books or housing costs. STR will not reimburse scholarships or grants but may make up the difference if the cost of tuition or applicable fees is more than the scholarship or grant would cover, not to exceed the allowable STR.

Chapter 3 Eligibility

3-1. National Guard Members (ARNG and ANG):

- a. Must have completed a semester as a full or part-time undergraduate or graduate student at a university, attend a community college for which credit toward a degree is granted, or will receive a certificate from a vocational/technical school or a VA qualified correspondence course. Courses that do not use a semester format but otherwise meet the criteria of this paragraph may qualify when approved by the Education Services Officer or STR Board.
- b. Are an active member of the Arizona National Guard throughout the entire semester or course for which reimbursement is claimed (i.e. drilling if applicable).
- c. Have satisfactorily completed IADT/Technical Training and Student Flight and performed duty upon returning at a minimum of ninety percent (90%) attendance of scheduled UTA dates and annual training during the period of schooling as described in the definitions. Service members must be in with the unit and have no active flags.
- d. Service members must not have an ETS date or resign from the National Guard within twelve (12) months from the completion of the course for which reimbursement is claimed.
- e. Maintained an average academic grade of "C" for each course. Those school or courses in which a grading system is used other than the alphabetical system, a grade equivalent to "C" or better will be acceptable. If more than one course is taken, the amount to be paid will be based upon those classes listed on the final grade report in which have been completed with an average academic grade of "C". For courses or training that only provide a pass or fail grade (certificate/license/lab/rotations) an official or unofficial transcript or certificate will be used to show successful completion.

3-2. Spouses and Legal Dependents (ARNG and ANG):

- a. Must be the legal spouse or dependent of an Arizona National Guardsman who meets the criteria under paragraph 3-1, sections a through d and must be enrolled in the Defense Enrollment Eligibility Reporting System (DEERS).
- b. Have completed a semester as a full or part-time undergraduate or graduate student at a university, attend

community college for which credit toward a degree is granted, or will receive a certificate from a vocational/technical school or VA qualified correspondence course. Courses that do not use a semester format but otherwise meet the criteria of this paragraph may qualify when approved by the Education Services Officer or STR Board.

c. Maintained an average academic grade of “C” for each course. Those school or courses in which a grading system is used other than the alphabetical system, a grade equivalent to “C” or better will be acceptable. If more than one course is taken, the amount to be paid will be based upon those classes listed on the final grade report in which have been completed with an average academic grade of “C”. For courses or training that only provide a pass or fail grade (certificate/license/lab/rotations) an official or unofficial transcript or certificate will be used to show successful completion.

d. Legal dependents currently enrolled in high school are eligible to use STR to apply for courses that they complete at a university, college, or vocational/technical school.

3-3. DEMA State Employees:

a. Must be a full-time employee of DEMA and have a current evaluation of at least “meets expectations.”

b. Remain employed with DEMA for twelve (12) months after the completion of the course for which reimbursement is claimed.

c. Courses must be taken during off duty hours or during periods of approved leave. Consideration may be given to the following, provided the arrangement does not impair delivery of services or attainment of work objectives:

(1) an adjusted work week

(2) voluntary use of compensatory or annual leave

d. Maintain an average academic grade of “C” for each course. Those school or courses in which a grading system is used other than the alphabetical system, a grade equivalent to “C” or better will be acceptable. If more than one course is taken, the amount to be paid will be based upon those classes listed on the final grade report in which have been completed with an average academic grade of “C”. For courses or training that only provide a pass or fail grade (certificate/license/lab/rotations) an official or unofficial transcript or certificate will be used to show successful completion.

Chapter 4 Application Procedures

4-1. Service Members, Spouses and Dependents (ARNG and ANG)

The following forms must be completed accurately and submitted for an application to proceed beyond the initial review:

a. AZ Form 621-300-1, dated 30 Aug 2024 AZNG Service Member, Spouse Dependent STR Application completes items 1 through 23. The Unit Commander (or their designated representative) must complete, sign, and date items 24 through 26;

b. Arizona W-9 Taxpayer Identification form; and

c. Arizona ACH-Bank Electronic Funds Transfer (EFT) form.

4-2. Application Submittal (ARNG, ANG, Spouses/Dependents)

a. Applications can be found at www.dema.az.gov/education and must be received by the Education Services Office (ESO) no later than twenty-one (21) calendar days after the beginning of the semester or course term as set by the educational institution’s registrar office. The applicant must also provide proof of start and end dates for the semester or course terms as published by the educational institution’s registrar.

b. Applications may be sent by email, in-person, or by certified mail to the address listed below:

Education Services Office
5636 E McDowell Rd, Building M5710
Phoenix, Arizona 85008-3495

or email:

AZDEMA.Tuition.Reimbursement@army.mil or ng.az.azarnng.list.g1-education@army.mil

4-3. DEMA State Employees

The following forms can be found at www.dema.az.gov and must be completed accurately and submitted for an application to proceed beyond the initial review:

- a. AZ 621-300-2, dated 30 Aug 2024, DEMA employees must complete, sign, and date items 1 through 17. The immediate supervisor will complete blocks 18 through 20;
- b. AZ W-9 Taxpayer Identification Form; and
- c. AZ ACH-Bank Electronic Funds Transfer form.

4-4. Application Submittal (DEMA State Employees)

- a. Applications will be submitted to the employee's immediate supervisor. The applicant must also provide proof of start and end dates for the semester or course terms as published by the educational institution's registrar.
- b. Applications will then be routed to the Education Services Office. The Education Services Office will provide the applicant's name to the State Human Resources Office to verify the employee's eligibility. Once verified, the Human Resources Office will note the use of STR in applicable systems and notify the Education Office of the applicant's status. Applications must be received by the Education Services Office no later than twenty-one (21) calendar days after the beginning of the semester or course term as set by the educational institution's registrar office.
- c. Applications may be sent to the Education Services Office by email, in-person, or by certified mail to the address or email listed in paragraph 4-2, b.

Chapter 5 Review

5-1. Initial Review

- a. After application submission, the Education Services Office (ESO) will review the application for completeness.
- b. The ESO will notify applicants (via email) who submit complete and accurate applications that their application was received and will be considered by the STR board for reimbursement.
- c. The ESO will return invalidated and/or incomplete applications to the applicant for corrections or completion. The applicant must then return the application to the ESO within 10 business days of receipt to be accepted for further processing.
- d. If an application is denied, the ESO will notify the applicant via email with an explanation included along with appropriate references.

5-2. Submission of Final Documents

- a. Upon Completion of Course:
 - (1) Applicant must provide a system generated unofficial or official transcript showing a grade of "C" or better and an itemized receipt showing a zero (\$0.00) balance for the appropriate course(s) to the ESO within twenty-five (25) calendar days from the date grades are posted by the institution. The itemized zero (\$0.00) balance receipt must show the applicant's name and name of the educational institution to be considered a valid receipt. Applicants may submit this documentation by email, in-person, or by

certified mail, to the address listed above. For courses or training that only provide a pass or fail grade (certificate/license/lab/rotations) an official or unofficial transcript or certificate will be used to show successful completion.

(2) Application packages must have submission of these final documents to qualify for STR.

b. Service Members Using FTA:

Service members who have a balance on their receipt due to their education institution because of ArmyIgnitED not paying FTA in a timely manner may complete the following steps to receive their STR:

(1) Have the educational institution notify ESO the reason that there is a balance.

(2) Provide a receipt to the ESO. The balance due should be in increments of two hundred and fifty dollars (\$250) per semester hour or one hundred and sixty-seven dollars (\$167) per quarter hour course. This balance should be verified by the ESO via ArmyIgnitED.

Chapter 6 Approval/Denial Procedures

6-1. Approval Procedures

An STR Board will meet quarterly, evaluate applications and rank applications for reimbursement approval according to the priority criteria established by The Adjutant General.

6-2. Board Selection

a. The STR Board will be made up of two members of the Army National Guard, two members of the Air National Guard, and one Department of Emergency and Military Affairs state employee and will be appointed at the beginning of each state fiscal year by a letter signed by The Adjutant General. Two alternates will also be appointed and may be selected from any of the above entities.

b. At a minimum, STR Board members will be senior leaders, at least one E-9 and one officer on the board at any given time. No board member shall be eligible for STR program while on the board. Spouses and dependents of board members may utilize the STR program pursuant to the board process in paragraph 6-3. Board members should recuse themselves from quarters where their spouse and/or dependents use STR to prevent possible conflicts of interest.

c. The STR board will meet quarterly to evaluate applications and rank application for reimbursement approval according to the priority of criteria established by The Adjutant General. The quarterly schedule will be as follows to the maximum extent possible:

First Quarter: July-September, Board in August

Second Quarter: October-December, Board in November

Third Quarter: January-March, Board in February

Fourth Quarter: April to June, Board in May

6-3. Board Process

a. The Adjutant General will provide a Letter of Instruction (LOI) to the STR Board on the intent of selection, to include priority levels determined by applicant's previous education and rank. The LOI will also be dictated by the funding priorities established by A.R.S. §§ 26-179 - 26-181, with eligible members of the Arizona National Guard be considered first, followed by eligible spouses and dependents of Arizona National Guard service members, followed by eligible DEMA state employees.

b. The Education Services Office will deliver all qualifying packets to the STR board on an Excel spreadsheet or equivalent, providing guidance as needed by the board members.

c. The Adjutant General will give final approval for members receiving STR and amounts given using the STR board recommendations.

6-4. Reimbursement

- a. Tuition reimbursement will be made on a semester basis (determined by quarter) and shall follow within 45 days of approval from the STR board and receipt of final documents (\$0 balance receipt and unofficial transcripts), whichever occurs last in accordance with A.R.S. § 26-181.
- b. Applicants not granted tuition reimbursement will be notified with a reason for non-selection.
- c. A tracking method will be created and utilized between entities that are involved in the reimbursement process to ensure timeliness of payment in accordance with A.R.S. § 26-181.

6-5. Recoupment (State Employees Only)

- a. If the requirements for STR are completely fulfilled in their entirety, to include twelve (12) months employment after course end date, no repayment by the employee is required.
- b. If the employee remains employed with DEMA less than twelve (12) months after completion of the reimbursed class or coursework, the employee will be required to repay expenses on a pro-rated basis. Each division is responsible for monitoring its employees.

Example:

- Employee's obligation is 52 weeks.
 - Employee has met 8 weeks of obligation.
 - divided by 52 equals 15.4% of obligation met.
 - \$2,000 multiplied by .154 equals \$308, which is the dollar amount the employee has satisfied.
 - \$2,000 minus \$308 equals \$1,692, which is the amount to be repaid by the employee to the agency for terminating employment within the twelve (12) month term.
- c. Unless an exception is authorized by the agency Director, the employee shall be responsible for and agrees to repay DEMA the pro-rated costs of tuition and registration fees if the employee's employment with DEMA terminates prior to the completion of the twelve (12) months term agreement for any reason whatsoever, including resignation by the employee or dismissal with or without cause.
 - d. In the event that the obligations are not met, the amount to be repaid will be deducted from the employee's last paycheck. Employee supervisor will notify State Human Resources Office of employee departure. State Human Resources will contact the Education Services Office if the employee is showing having received STR assistance within the last twelve (12) months. The Education Service Office will respond to the State Human Resources Office and DEMA Payroll Office with the amount of money to be withheld from the employee's paycheck. Any portion of the amount to be repaid not covered by the deduction from the last paycheck shall be paid by the employee to DEMA and must be received no later than five (5) working days after the last day of employment.

6-6. Auditing and Reporting

A report shall also be generated every fiscal year per statutory guidance.

Appendices

Section I

Required Publications

A.R.S. § 26-179

Tuition and fees reimbursement; eligibility; exemption

A.R.S. § 26-180

Application for tuition and fees reimbursement; times

A.R.S. § 26-181

Evaluation of applications; payment of tuition and fees reimbursement; report

Section II

Prescribed Forms

This section contains no entries.

Glossary of Terms

Average Academic Grade of “C”

An indication either by letter or number, provided on a system-generated unofficial transcript that indicates satisfactory completion of course or semester. For courses or training that only provide a pass or fail grade (certificate/license/lab/rotations), an official or unofficial transcript or certificate will be used to show successful completion.

Completion of Semester

The date on which grades are required to be posted by the institution’s registrar’s office following the prescribed program of instruction as indicated by the catalogue of an approved educational institution.

Educational Institution

Those schools, to include universities, colleges, and vocational/technical school with accreditation through federally recognized Accrediting Institutions for post-secondary education, ACE Guide, or those approved by the United States Department of Veterans Affairs (VA).

Federal Education Benefits

Any benefit for which a service member is eligible, including but not limited to, non-transferred Chapter 33 GI Bill (Post 9/11), federal financial aid, grants, and scholarships, and may or may not be contingent on military membership.

Federal Tuition Assistance (FTA) (AZNG)

Any service member that is eligible for FTA for degree seeking programs, up to a graduate level. Suspensions or holds on the service member ArmyIgnitED account, excluding if the service member is flagged, still considers that service member eligible.

Full-time/Part-time Graduate of Undergraduate Student

A student officially enrolled in courses at an approved Education Institution.

Satisfactory Participation (AZNG)

Satisfactory participation is a minimum of ninety percent (90%) of Unit Training Assemblies (UTAs) during the period of schooling or training for which reimbursement is claimed. The service member must be in good standing with the unit and have no active flags. Service members on T10/T32 mobilization orders are eligible as long as they are not flagged.

Satisfactory Performance of Annual Training (AT) (AZNG)

Performed satisfactorily during annual training preceding termination of the semester/course for which reimbursement is claimed. This requirement is waived for individuals assigned to units that are not scheduled to perform AT during the period beginning with the applicant’s return from IADT/Technical Training and Student Flight and termination of the semester or course, or those individuals for whom annual training has been waived by the appropriate authority.

Semester or Course

A prescribed program of instruction as indicated by the catalogue of an approved Educational Institution.

Training (AZNG)

The Initial Active Duty (IADT)/Technical Training, Academy of Military Service (AMS), or Officer Basic Course (OBC)/Officer Training School (OTS) that are required to properly qualify the individual in their Military Occupational Specialty (MOS)/Air Force Specialty Code (AFSC).

Vocational/Technical School

May be referred to as a trade school, career center, or vocational college. This is an educational institution designed to provide vocational education or technical skills required to perform task of a particular and specific job. The Education Services Officer will generally defer to ArmyIgnitED criteria to establish eligibility for these schools.

SUMMARY of CHANGE

DEMA PAM 621-300

State Tuition Reimbursement

Cover Sheet –

- Non-contract statement added to Applicability.
- Appropriations statement added (1-2).
- “State” added.

Contents –

- Corrected format
- Definitions moved to Glossary of Terms

Chapter 3 –

- Added 12-month ETS requirement (4-1, d)
- Added 12-month ETS requirement of sponsor for spouse/dependent.
- Added DEMA criteria (4-3)

Chapter 4 –

- Split forms requirements from submittal for other service members, spouse/dependents, and state.
- Added Forms for state. (State application in work, see comment about W9 and ACH)
- DEMA submittal added/adjusted per conversations with SHRO (see comment)

Chapter 5 –

- Made submittal of final documents all-inclusive as same docs are required from everyone per ARS.
- Split service member FTA language

Chapter 6 –

- Approval procedures were kept at the ESO as approval requirements are the same for everyone, to include TAG use of STR Board per ARS and TAG Policy
- Added state employee spot on STR Board
- Adjusted quarter schedule to match state FY.
- Split board selection from board process
- Added DEMA recoupment language made two adjustments:
- Have employee supervisor notify SHRO than SHRO requests recoupment amount from ESO who sends to SHRO and Payroll per conversation with Mrs. Gibbs
- Moved para c, i, to chapter 2 limitations.
- Added tracking requirement.

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