

Educational Benefits Action Plan

Using This Worksheet

Use this worksheet during and after attending the Education Benefits module to help create a plan for taking advantage of your earned Education benefits.

NOTE: The symbols in this handout are keyed to parts of the on-screen presentation. If you see a symbol in the presentation, you can quickly find the relevant part of this handout to take notes or enter information.

Step 1: My Educational Benefits

Indicate which program under which you have earned educational benefits. If you are not sure, call (555) 555-5555 for assistance.

Legacy Montgomery GI Bill

- A full-time student can expect to receive up to \$1,994 monthly for full-time institutional training.
- This benefit program expires ten years after service.
- Students have a maximum of \$71,784 in total benefits, depending upon the type of program chosen.

Post 9/11 GI Bill


- Pays all of the tuition for any in-state public school, but caps at \$22,805 per year for private schools.
- Students must have served on active duty for a minimum of a 36 months to gain the 100% rate, otherwise, this benefit is a prorated lesser dollar amount.

Step 2: How I Intend to Use My Benefits

The type of program or degree does not affect your benefits. But, it is an important step in choosing which institution you want to attend.

I do not plan to use my education benefits  Go To Step Five

I plan to pursue a trade school / certification program  Go To Step Three

I plan to pursue a degree program  Go To Step Three

Associates / undergraduate Degree

Graduate degree

Post-Graduate degree


I plan to pursue another type of program (specify)  Go To Step Three

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Step 3: Where Do I Plan To Start My Education / Training Program?

If you are not sure, visit www.exploreva.gov or call (555) 555-5555 for information on choosing institutions for education and training programs.

Name of institution (ex: college, trade school): _____

Does your preferred school offer a yellow ribbon scholarship?  Yes No

Spouses of active duty service members are not eligible for the Yellow Ribbon Scholarship. Children of active duty service members are eligible. The service member must be at the 100 percent benefit level in order for anyone in the family to receive a Yellow Ribbon Scholarship

Have you applied for your institution's Yellow Ribbon Scholarship? Yes No

You must apply for the scholarship. It will not be given automatically.

Step 4: When Do I Plan To Start My Education / Training Program?

Always check application deadlines for your desired institution by visiting their website or calling your school. Your institution may require your application be submitted many months before you plan to begin.

Semester (Spring, Summer, or Fall): _____

Year: _____

After acceptance, will you have time to allow at least 30 days to file? Yes No

After you are accepted for institution, you should plan at least 30 days to file for educational benefits and receive eligibility notification from the VA. It is wise to allow for even more time, if possible.

Notes:

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Step Five: Transfer of Benefits

You can transfer benefits to a qualified individual, if you meet certain criteria. If you mark any of the following questions as "No," you are NOT eligible to transfer educational benefits to your spouse or children. Best practice is to transfer at least one month's benefit into everyone's name.

Benefit Reassignment Validation

Did you apply for a Transfer of Entitlement (TOE) through milConnect at least Four Years Prior to your Separation Date? Yes No

Did you complete at least six years of active service? Yes No

Has the person getting benefits enrolled in the Defense Enrollment Eligibility Reporting System (DEERS)? Yes No

Transfer of Benefits

To transfer your educational benefits, you need to indicate who the benefits go to, and which percentage of your benefits will go to each recipient. You may move these benefits at any time after separation or retirement as long as your dependents remain eligible.

Percentage to Spouse	_____	Name	_____
Percentage to Child	_____	Name	_____
Percentage to Child	_____	Name	_____
Percentage to Child	_____	Name	_____
Percentage to Child	_____	Name	_____

Step Six: Issues I Need to Research and Decide Upon:
