

EDUCATION REIMBURSEMENT FOR PRIMARY RESERVISTS

Ref: CANFORGEN 043/01 ADMHRMIL 023 041201Z May 01

P Res members who are not eligible for the Personal Enhancement Program under DAOD 5031-3 but are serving on Class A, B, or C service will still be entitled to reimbursement under the new trial program. The new program will reimburse the lesser of 50% of tuition or \$2,000 in a fiscal year to a total of \$8,000.

Eligibility

- a. Be on effective strength of a P Res unit.
- b. Be registered full or part time at a Canadian post-secondary institution.
- c. For an officer, the university course of study must lead to an initial Baccalaureate degree and be suitable for the P Res MOC. For an NCM, any university course of study leading to an initial Baccalaureate degree is eligible. As well, any post-secondary course formally recognized as an equivalency for the members MOC is eligible.
- d. Successfully complete the military basic training course specified by the members P Res element.

Continuous Service

- a. Continuous service on part time Class A or full time Class B or C service is required to be eligible to claim reimbursement. Supplementary Reserve members are not eligible.
- b. If the member interrupts continuous service for more than 30 days (except for maternity or parental leave), the member is not eligible to claim reimbursement for the academic year during which continuous service is broken.
- c. All P Res officers are entitled to reimbursement under this new program.
- d. Members have one year to claim reimbursement entitlements provided by this instruction.

Documents Required to be Processed

- a. letter from CO stating that the mbr was not NES
- b. proof registration in academic programme
- c. transcripts
- d. original receipts
- e. void cheque

ADM (HR-MIL) INSTRUCTION 04-01

EDUCATION REIMBURSEMENT FOR PRIMARY RESERVE

IDENTIFICATION

Date of Issue	30/07/2001
Application	This ADM (HR-Mil) Instruction applies to members of the Canadian Forces Primary Reserve
Supercession	ADM (HR-Mil) Instruction 04/00 10 July 2000
Approval Authority	This Instruction is issued under the authority of ADM (HR-Mil)
Enquiries	Director of Training and Education Policy (DTEP)
Document Content	<ul style="list-style-type: none">• Background• General• Eligibility• Entitlements• Process• Supplementary Information• Co-ordination• Disposition• References

BACKGROUND

In response to the Standing Committee On National Defence and Veterans Affairs recommendation 83, to facilitate access to higher education for Non-Commissioned Members (NCM), a four year trial program of education reimbursement has been approved to assist Primary Reserve (P Res) members in selected post-secondary studies. The P Res Officer program implemented by ADM (HR-Mil) Instruction 04/00 is replaced by this new trial program.

GENERAL

The aim of this instruction is to provide details of a program to encourage P Res members to pursue an initial baccalaureate degree or a non-university post-secondary course formally recognized as an equivalency for the member's Military Occupation Code (MOC). Guidance on claim processing and reimbursement under the Personal Enhancement Program is included in this instruction.

ELIGIBILITY

Members on the effective strength of a P Res unit or establishment who:

- 1) Are registered at a Canadian post-secondary institution in a course leading to an initial baccalaureate degree or any other non-university post-secondary course formally recognized as an equivalency for the member's MOC IAW DAOD 5031-1;
- 2) Successfully complete the military basic training course specified by the member's P Res element; and
- 3) Maintain continuous service during the academic year claimed. (Special provisions apply to new enrollees or members medically released.)

ENTITLEMENTS

For courses started after 1 Sep 00, the lesser of 50% of tuition and mandatory course costs to a maximum of \$2,000 in a fiscal year will be reimbursed each Sep for courses successfully completed in the preceding academic year (Sep – Aug). The maximum benefit to an individual is \$8,000.

PROCESS

- A guide for Education Reimbursement (ER) For Primary Reserve is provided at Annex A to this instruction.
- Registration is required as detailed at Annex B to this instruction.
- Application for reimbursement is detailed at Annex C to this instruction.

SUPPLEMENTARY INFORMATION

- DAOD 5031-3 defines eligible expenses.
- DAOD 5031-3 provides guidance on tax free reimbursement for employer related education upgrading.
- Benefits may be claimed upon transfer between P Res and Regular Force components of the CF based on the course completion date.
- Members who are released under QR&O 15.01 Items 3A and 3B, as a result of an injury attributable to military service, qualify for reimbursement under this instruction for courses completed prior to the date of medical release.
- Continuous service is defined as full time or part-time service in the P Res. If a member interrupts continuous service for more than 30 days (except for maternity or parental leave), the member may not claim reimbursement for the academic year during which continuous service is broken.

- Any of the following constitutes an interruption in continuous service for the purpose of this instruction:
 - 1) Leave without pay (QR&O 16.25) (excluding maternity or parental leave);
 - 2) Limitation of payments (QR & O 203.20);
 - 3) Suspension from duty (QR & O 19.75);
 - 4) Forfeitures imposed (QR & O 208.30 and 208.31);
and
 - 5) Non-effective strength.
- To attract recruits who are already attending post-secondary institutions, eligible costs may be registered and subsequently reimbursed for the full academic semester (as defined by the institution) during which the member enrolls, or re-enrolls in the P Res.
- P Res officers who hold an entitlement earned under ADM (HR-Mil) Instruction 04/00 may apply for reimbursement under the terms of this instruction provided the member is serving on the date this instruction is promulgated.
- Time limit: Members have one year from the Sep in which the entitlement is earned (as defined in Annex A) to claim reimbursement.

CO-ORDINATION

Questions may be directed to the Base/Wing Personnel Selection officers or as follows:

- 1) Personal Enhancement Program Co-ord: DTEP 4 staff at (613) 996-2016
- 2) Personal Enhancement Program Management Information System: DTEP 4 staff at (613) 995-0165
- 3) Procedures to get formal recognition of courses as an equivalency: DTEP 4 staff at (613) 995-0089
- 4) Policy: DTEP 2 staff at (613) 995-6763

DISPOSITION

A review of the trial results will be conducted by DTEP in Sep 03 to determine the future of the program after Aug 04.

REFERENCES

- DAOD 5031-1
- DAOD 5031-3
- CFAO 49-10
- CFAO 9-12

GUIDE FOR EDUCATION REIMBURSEMENT FOR PRIMARY RESERVE

Step	Action Agency	Notes
1. Eligibility		
<i>Primary Reserve Member. Some full time Reservists may also be eligible under a related program detailed in DAOD 5031-3.</i>	<i>Unit: Recommend use of DAOD 5031-3 if member eligible. A course may not be claimed under DAOD 5031-3 and this ADM (HR-Mil) instruction. The member may elect one or the other.</i>	<i>Note under the related Personal Enhancement Program (PEP), an eligible member may claim on course completion. A medical release benefit under PEP also applies to part-time Reservists.</i>
2. Registration		
Primary Reserve member.	Member: Complete Anx B Registration for courses started after 1 Sep 00 in Canadian post secondary institution. Member to sign statement at para 3.	
	Unit: Certify member is on effective strength and courses are eligible. Designated officer to sign para 4.	Any Canadian undergraduate degree program is eligible for reimbursement. (Certificate courses equivalent to university degree academic credits may be registered and claimed when the member is enrolled in university.) Members considering service as an Officer should consult the recommended degree programs for a MOC if specified in CFAO 49-10 Anx A Appx 2. CFAO 9-12 provides further guidance. Non-university courses must have MOC formal equivalency on record IAW DAOD 5031-1 to be eligible.
	B/WPSO: Enter into PEP, sign para 5, return Anx B to unit.	
	Unit: Retain completed Anx B on Pers File. Copy to member.	
	Member: Retain copy completed Anx B with receipts	
3. Entitlement Earned	Member:	Upon successful completion of any eligible course and continuous service until the following Sep.

Step	Action Agency	Notes
4. Claim Reimbursement	Member: Complete Annex C and sign para 2.	In Sep annually, claim the lesser of 50% or \$2,000 for courses completed in the immediately preceding academic year (Sep – Aug).
	Unit: Certify the member holds basic military training course and the required continuous service (or med release). Sign para 3 of Anx C.	Continuous P Res or Reg Force service required. Cannot claim for academic year during which continuous service was broken for more than 30 days. New or re-enrollees may claim costs from start of academic semester (as defined by the institution) when they joined.
	B/WPSO: Recommend payment para 4 of Anx C and enter into PEP.	

Examples:

1. The Primary Reservist who started the first year of a four year undergraduate university degree full time program in Sep 00 completes courses towards the first academic year in May 01. The member has continuous service from Sep 00 to Aug 01. At the P Res unit in Sep 01, the member may claim the lesser of 50% tuition or \$2,000 for courses successfully completed, provided the member has completed the basic military training course required by the P Res element for the MOC. For each subsequent year of study, the member may claim each Sep up to the individual's \$8,000 program limit provided continuous service is maintained.
2. A candidate from a community college automotive technician diploma program is recruited by the Army Reserve service battalion as a veh tech. Once the program for that college has been formally documented as an equivalency for the MOC, if the member joins the service battalion in Feb, the member will be able to claim reimbursement of the lesser of 50% tuition or \$2,000 incurred in the academic semester of enrolment in Sep of that year. The member must have completed the Army Reserve Basic Recruit Training and maintained continuous service since enrolling in the P Res. For each subsequent year of study, the member may claim each Sep provided continuous service is maintained.

3. A Communication Reserve private in the Land Communication Information Systems Tech MOC starts a three year Electrical Technologist Diploma at a community college in Sep 00. Once the college program is formally documented as an equivalency for the member's MOC, the member may claim the lesser of 50% tuition or \$2,000 each Sep provided the member has completed the Communication Reserve Basic Recruit Training Course and maintained continuous service.
4. An Air Reserve NCM takes two part time undergraduate degree courses Sep 00 – May 01. In Sep 01, the member may claim the lesser of 50% tuition or \$2,000 provided the member is Basic Recruit Trained and maintained continuous service.
5. A part-time P Res member has completed a university academic year in May 01 and then joins the Regular Force. As the course was completed while a member of the P Res, the member may claim reimbursement under this instruction through the Regular Force unit in Sep 01 provided continuous service was maintained during the academic year claimed.
6. After finishing a period of full time service, the P Res member completes an initial baccalaureate degree course. If the course is completed within one year of reversion to part-time service, the member with two or more years of cumulative full time service is eligible for 75% of tuition and mandatory course costs under provisions of DAOD 5031-3. The member is also eligible for the lesser of 50% or \$2,000 under this instruction. The member may elect to claim under one or the other bearing in mind the post release or reversion to part-time service benefit is available only once in a CF career.

Transition examples from ADM (HR-Mil) Instruction 04/00:

7. An Army Reserve university student started an undergraduate degree course of study Sep 99. The officer who holds an entitlement earned under ADM (HR-Mil) Instruction 04/00 may claim the lesser of 50% or \$2,000 now provided the member has continuous service during the Sep 99 – Aug 00 academic year, is BOTC (or RESO II) qualified and is serving in the P Res (or Reg Force) on the date of this instruction.
8. A Naval Reserve officer completes the first two years of full time university undergraduate study started Sep 99 and then takes a two year callout on a MCDV starting summer 01. The member may claim the first year now, provided continuous service was maintained in the Sep 99 – Aug 00 academic year. The second year may be claimed in Sep 01.

PROTECTED A
(When Completed)

4. Reserve Unit Certification: The member is serving on effective strength of this unit: (Select applicable para a. or b.)
- a. This member is attending a Canadian university program of study towards an initial baccalaureate degree; or
 - b. This member is attending a non-university course of study which is formally recognized as an equivalency for the member's MOC. A copy of the Managing Authority's record of equivalency is attached. (DAOD 5031-1 refers.)

Name	Rank	Designated Officer Signature	Date
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5. Supporting Base/Wing Personnel Selection Office:

Entered into PEP Management Information System Primary Reserve Registration Screen:

Name	Rank	PEP Operator Signature	Date
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Notes:

- 1. Once paragraph 5 is completed, a copy will be returned to the member and a copy placed in the member's pers file.
- 2. The member is to retain a copy of this completed Annex B along with original receipts.

PROTECTED A
(When Completed)

PROTECTED A
(When Completed)

- b. The member has been released under QR & O 15.01 Items 3A or 3B, as a result of an injury attributable to military service and qualifies for reimbursement of the lesser of 50% of tuition and mandatory course costs or \$2,000 for courses completed as at the date of medical release.

Name	Rank	Designated Officer Signature	Date
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4. a. Verification by Base/Wing Personnel Selection Officer or Education Officer:

I am satisfied that the claimant has met the criteria necessary for reimbursement and that the required documentation (Note 1) has been provided. Payment of the claim is authorized as a (delete one) non-taxable or taxable benefit (Note 2).

Name	Rank	Base/Wing PSO Signature	Date
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- b. Entered into PEP Management Information System in Primary Reserve Payment Screen:

Name	Rank	PEP Operator Signature	Date
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Notes:

1. Unit certification of continuous service and completion of the basic military training course required by the P Res element will be based on unit records. The following documents are attached:
 - a. Annex B Registration For Education Reimbursement P Res;
 - b. Proof of course(s) completed;
 - c. Tuition receipts;
 - d. Receipts for books;
 - e. Explanation of eligible expenses; and
 - f. CF 52.

2. Where the member has not been employed by the CF (or does not intend to remain employed by the CF) for a year following the courses claimed, the benefit is to be reported as taxable.

PROTECTED A
(When Completed)