

WI GI Bill Facts as of August 2011

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GENERAL INFORMATION

The following is a list of important facts about Wisconsin G.I. Bill tuition remission benefit program (WI GI Bill).

These Wisconsin GI Bill is a complex benefit. Understanding the relationship among state and federal veterans benefits, and knowing which are best for your specific circumstance will require you to be well informed. You are urged to speak directly with the following resource people:

- County Veterans Service Officer regarding Wisconsin Veterans Benefits programs (<http://dva.state.wi.us/CVSO.asp>),
- Veterans Administration regarding federal benefits programs (<http://www.gibill.va.gov/>), and
- School Veterans Certifying Officer at your campus (contact information available at <http://uwhelp.wisconsin.edu/paying/veterans.aspx>)
- **NOTICE: Changing to the Federal Post-9/11 GI Bill Benefit is an irrevocable decision. We recommend careful consultation with federal, state, and higher education veteran's benefits staff about any decision to elect the Post-9/11 GI Bill benefit.**

This document references the following federal veterans benefit programs: Chapter 30 (Montgomery GI Bill-Active Duty), Chapter 1606 (Montgomery GI Bill-Selected Reserve), Chapter 1607 (Reserve Educational Assistance Program-REAP) and Chapter 35 (Survivors' and Dependents' Educational Assistance Program-DEA).

NOTE: The WI GI Bill is complicated legislation with many possible permutations depending on an individual's status and eligibility for a wide range of federal and state benefit programs. A **flow chart** is provided at the end of this document to visually capture some of the "what if" situations.

- 1. State of Wisconsin WI GI Bill Eligibility Requirement for Veterans:** If a veteran has federal active duty service since September 10, 2001, he or she must apply for benefits provided by the Post-9/11 GI Bill before he or she can receive benefits under the WI GI Bill. Except as noted in a & b following, if a student is eligible for Post-9/11 Bill benefits and does not elect to use them, he or she will not be eligible to receive the WI GI Bill tuition remission until such time as he or she does elect to use the Post-9/11 GI Bill benefit.

Exceptions to #1:

- a. If a veteran has fewer than 12 months of eligibility remaining under Chapter 30 (Montgomery GI Bill – Active Duty), Chapter 1606 (Montgomery GI Bill – Selected Reserve), or Chapter 1607 (REAP) as of the first day of the academic

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term in which he or she seeks to enroll, he or she may be exempt from this requirement. Please see point 9 for additional information.

- b. If a veteran has no Post-9/11 GI Bill benefit eligibility based upon his or her own military service and has received transferred Post-9/11 GI Bill benefits from a parent or spouse, the veteran is not required to use the transferred benefits in order to use the WI GI Bill.

- 2. WI GI Bill Eligibility Requirement for Children and Spouses:** If a child or spouse who is not a veteran, has received transferred Post-9/11 GI Bill benefits from a parent or spouse, the student (that is the child or spouse) must use the transferred benefits before he or she can receive benefits under the WI GI Bill. Two exceptions are noted below (a and b). If the child or spouse has received transferred Post-9/11 GI Bill benefits and does not elect to use them, he or she will not be eligible to receive the WI GI Bill tuition remission until such time as he or she does elect to use the transferred Post-9/11 GI Bill benefit first.

Exceptions to #2:

- a. If the child or spouse also has fewer than 12 months of eligibility remaining as of the first day of the academic term in which he or she seeks to enroll under Chapter 35 (DEA), Chapter 1606 (Montgomery GI Bill – Selected Reserve), or Chapter 1607 (REAP), he or she may be exempt from this requirement. Please see point 9 for additional information.
 - b. If the student is using the WI GI Bill as a child or spouse and the student has Post-9/11 GI Bill benefits based upon his or her own military service, the student may continue to use the WI GI Bill without using his or her own Post-9/11 GI Bill
- 3. New Applicants:** New applicants for the WI GI Bill will be asked on the WI GI Bill application form (WDVA form #2029) to declare whether they have had active duty service since September 10, 2001. Veterans who have had active duty service since that date may or may not be eligible for the WI GI Bill as described in #1 above. Children and spouses applying for WI GI Bill benefits under the eligibility of a parent or spouse, may or may not be eligible for the WI GI Bill as described in #2 above. Form 2029 will be available from the School Veterans Certifying Official and as part of the packet of application materials for the WI GI Bill available from the Wisconsin Department of Veterans Affairs.
 - 4. Clarification Regarding the 128 Credit Limit:** The 2009-2011 Wisconsin Biennial Budget Act clarified that the total WI GI Bill eligibility to 128 credits or 8 semesters, whichever is longer, is the combined total credits and semesters attended at all UW institutions and Wisconsin Technical Colleges. For example, if a student uses 30 credits of WI GI Bill tuition remission at a Wisconsin Technical College and 30 credits of WI GI Bill tuition remissions at UW institutions, that student will have 68 WI GI Bill credits remaining of the 128 total credits allowed. Students will be responsible for the costs of credits beyond 128 credits or 8 semesters, whichever is longer.

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- 5. Relationship between Federal and State Benefits:** The Wisconsin 2009-2011 Biennial Budget Act provided that veterans must use Post-9/11 benefits before any WI GI Bill benefit. As described in #1 above, as long as a veteran elects to apply for Post 9/11 GI Bill benefits, he or she may be eligible to also receive WI GI Bill benefits. If the Federal VA determines that a student is eligible for less than 100 percent of the Post-9/11 GI Bill benefit, the WI GI Bill can be used to remit any remaining tuition amount (up to the amount that would normally be covered by the WI GI Bill).

Under the Wisconsin 2011-13 Biennial Budget Act Post-9/11 GI Bill benefits used at University of Wisconsin institutions or Wisconsin Technical Colleges **will not** reduce (count against) the total 128 credits or 8 semesters, whichever is longer, that Wisconsin allows an eligible veteran, spouse, or child to receive under the WI GI Bill.

- 6. WI GI Bill Supplemental Payment:** Students who elect to switch from federal Chapter 30 (Montgomery GI Bill-Active Duty), Chapter 1606 (Montgomery GI Bill-Selected Reserve), or Chapter 1607 (REAP) to the Post-9/11 GI Bill benefit in order to use WI GI Bill benefits (as required by Wisconsin State Law), may be eligible for a state Supplemental payment paid by the Wisconsin college or university.

This payment represents an approximation of the difference between the benefits a student would have received from Chapter 30, Chapter 1606, or Chapter 1607 and those the student will receive after relinquishing another federal benefit to enroll in the Post-9/11 GI Bill. Students who receive an equivalent or larger benefit package under Post-9/11 GI Bill, or who have exhausted their 36 months of Chapter 30 benefits, will not receive a Supplemental payment.

- a. **Eligibility:** Veterans are eligible to receive the supplemental payment if they were entitled to Chapter 30, Chapter 1606, or Chapter 1607 and relinquished one or more benefits when they elected their Post-9/11 GI Bill benefit. Veterans who relinquished a benefit to use Post-9/11 GI Bill benefits transferred to them by a parent or spouse are not eligible for a Supplemental Payment.
- b. **Financial Aid:** The Supplemental Payment paid under the WI GI Bill is considered as a student resource for financial aid purposes and may affect a student's eligibility for other state or federal financial aid. Financial Aid offices will estimate the Supplemental Payment when packaging a student's financial aid.
- c. **Payment Process:** Supplemental payments will be directly deposited into students' accounts according to standard campus business practices and are subject to a student's other outstanding financial obligations.
- d. **Timing for University of Wisconsin Institutions:** The Supplemental Payment will be made twice each term. The first payment will be for 50% of the estimated semester amount and applied to the student's account sometime after the institution's last day to drop courses. The second payment, for 50% of the final adjusted amount, will be made after grades for the term are posted. All Supplemental Payments will be made based on this timing, even if the student is enrolled in a session that does not coincide with the standard term begin and end dates.

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- e. **Timing for Wisconsin Technical Colleges:** WTCS colleges will make Supplemental Payments based on existing student account procedures. Students should check with the Wisconsin Technical College they are attending to verify the Supplemental Payment timing and process.
 - f. **Children and Spouses:** Children and spouses may be eligible for a Supplemental Payment if they switched from Chapter 35, Chapter 1606, or Chapter 1607 to use Post-9/11 GI Bill benefits transferred to them by a parent or spouse. Children and spouses who switched from Chapter 35, Chapter 1606, or Chapter 1607 to use Post-9/11 GI Bill benefits earned through their own military service are not eligible for a Supplemental Payment. Children and spouses are not eligible for a Supplemental Payment if they switch from Chapter 30.
 - g. **Taxability of the Supplemental Payment:** In compliance with federal requirements, UW and WTCS institutions provide the 1098-T to students. Neither UW nor WTCS institutions provide personal tax advice or guidance to students. Students are responsible for working with a tax professional to assess the tax implications of the Supplemental Payment.
 - h. **Overpayment of the Supplemental Payment:** Students will be responsible for repaying the college or university for any Supplemental Payment amount paid in excess of their eligibility. This is most likely to occur if a student adds or drops classes or withdraws during a semester.
- 9. Additional Months of Post-9/11 GI Bill Benefits Eligibility:** The Federal Veterans Administration has provided that some veterans may be eligible for up to an additional twelve months of eligibility for Post-9/11 GI Bill benefits if they exhaust their Chapter 30 benefits prior to enrolling for Post-9/11 GI Bill benefits.

The WI GI Bill was written to assist students in claiming these additional months of benefits. When a student wishing to use the WI GI Bill has 12 or fewer months of remaining eligibility under a prior federal veterans benefit program and has qualifying active duty service following Sept. 10, 2001, he or she will be allowed to receive WI GI Bill benefits as described below. The twelve or fewer months of remaining eligibility will be counted from the first date of the term in which the student wants to use the WI GI Bill.

- a. **Veterans Exhausting Federal Benefits:** Beginning in Spring 2010, veterans using the WI GI Bill with 12 or fewer months of remaining eligibility as of the first day of the semester in which they seek to enroll under Chapter 30, Chapter 1606, or Chapter 1607, with active duty service following September 10, 2001, will be allowed to continue to receive WI GI Bill benefits until the Chapter 30, 1606, or 1607 benefits are exhausted. At that point, they will be required to enroll for Post-9/11 GI Bill benefits before receiving any additional WI GI Bill benefits. Students will not be eligible for a Supplemental Payment while they are exhausting their Chapter 30, Chapter 1606, or Chapter 1607 benefits or while using the 12 additional months of Chapter 33 eligibility. Both the Verification of Continuing Eligibility Form and the WDVA Form #2029 allow students to

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indicate that they have 12 or fewer months of benefit remaining and indicate their desire to exhaust a previous benefit. Students selecting this option will be required to provide a copy of their most current VA awards letter or Web Automated Verification of Enrollment (WAVE) to document that they have twelve or fewer months remaining of the appropriate federal benefit.

- b. **Children and Spouses Exhausting Federal Benefits:** Students using the WI GI Bill as children or spouses who have 12 or fewer months of Chapter 1606, Chapter 1607, or Chapter 35 benefits will be allowed to exhaust these benefits prior to signing up for Post-9/11 GI Bill benefits. Please note that according to the WI GI Bill, students using Chapter 30 as children or spouses are not included among those able to exhaust their benefits prior to signing up for the Post-9/11 GI Bill. Students are not eligible for a Supplemental Payment while they are exhausting their Chapter 35, Chapter 1606, or Chapter 1607 benefits or while using the 12 additional months of Chapter 33 eligibility. Both the Continuation of Eligibility Form and the draft WDVA Form #2029 allow students the option to indicate that they have 12 or fewer months of benefit remaining and indicate their desire to exhaust their previous benefit. Students selecting this option will be required to provide a copy of their most current VA awards letter or Web Automated Verification of Enrollment (WAVE) to document that they have twelve or fewer months of the appropriate federal benefit.

10. Dropping/Withdrawing: Students should be aware that there are **significant** financial consequences when adding or dropping classes paid for by the Post-9/11 GI Bill. Adding classes, dropping classes or withdrawing may result in a student being required to repay the Federal VA for any benefits received during that term, and to repay the Supplemental Payment granted under the WI GI Bill. Students are urged to carefully consider the financial consequences of any enrollment changes.

11. Transferred Post-9/11 benefits: Veterans who have transferred Post-9/11 GI Bill benefits to a spouse or children must have retained or reclaimed for their own use sufficient months of Post-9/11 GI Bill benefits in order to use the WI GI Bill for that term.

- a. As long as a veteran has remaining Post-9/11 GI Bill benefits, whether or not they have been transferred to a spouse or child, the veteran will need to use or reclaim some of those benefits if the veteran wants to use the WI GI Bill him or herself.
- b. If a veteran transfers all of their Post-9/11 GI Bill benefits to a child and/or spouse, the veteran will be ineligible for the WI GI Bill until such time as the child or spouse completely exhausts the transferred benefits, or the veteran reclaims some benefit for him or herself.
- c. If a spouse or child receives transferred Post-9/11 GI Bill benefits, the spouse or child must apply the Post-9/11 GI Bill benefits first before using WI GI Bill benefits. .

12. Combined Benefit Payments: When a student's tuition and fees are partially covered by the Post-9/11 GI Bill, partially covered by a WI GI Bill tuition remission, and/or

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partially ineligible and therefore paid by the student, the payments will be made as follows:

UWS EXAMPLE: A veteran is attending UW Colleges. The student is eligible for the Post-9/11 GI Bill at the 60% benefit level and for the WI GI Bill. The veteran is taking six traditional credits for \$1,163.23 in tuition and fees and six credits on-line in two on-line courses for \$1,500.00. The on-line courses also have an administrative fee of \$50.00 per course for an additional charge of \$100.00. The total tuition and fees for the 12 credits cost \$2,763.23.

The Post-9/11 GI Bill will pay the University 60 % of the six traditional credits (\$697.94), 60% of the online credits (\$900.00), and 60% of the administrative fee (\$60.00). Combined, the Post-9/11 GI Bill pays \$1,657.94 or 60% of the total cost.

The University will then apply a tuition remission for 40% of the remaining WI GI Bill-eligible amount. The WI GI Bill tuition remission covers standard tuition, tuition in cost recovery, online and distances education programs as well as certain fees. In this example, it would not cover the administrative fee. So the WI GI Bill tuition remission would apply for 40% of the six traditional credits (\$465.29) and 40% of the tuition for the online credits (\$600). The total covered by the WI GI Bill is then \$1,065.29 or 38% of the total cost.

Once the two benefits are applied, the student is responsible for the remaining \$40.00 which is the amount of the administrative fee that is not covered by the WI GI Bill.

WTCS EXAMPLE: WTCS colleges may assess additional fees and charges beyond program and material fees that are not covered by the WI GI Bill, such as the \$10.00 online course fee. Students will be responsible to pay any fees not covered by the Wisconsin GI Bill or Post-9/11 benefits.

13. Appeals: All University of Wisconsin System institutions and Wisconsin Technical Colleges have appeal processes in place for students who disagree with a decision or action. For details, contact the specific institution and office involved.

For more information about Veterans' Benefits, contact your County Veterans Service Officer, the Federal Veterans Administration, or the School Veterans Certifying Official at your campus.

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New Wisconsin GI (WIGI) Bill Benefit Structure as of January 2010

Wisconsin GI Bill Status	Post-9/11 GI Bill Eligibility Basis	Relinquished Benefit	Required to use Post-9/11 GI Bill Benefits?	Supplemental Payment Eligible?	Post-9/11 GI Bill Credits Count Against WIGI?	12-month exemption eligible?
Child/Spouse	Transferred Benefit	None	Yes	No	No	No
		Chapter 30	Yes	No	No	No
		Chapter 35	Yes	Yes	No	Yes
		Chapter 1606	Yes	Yes	No	Yes
		Chapter 1607	Yes	Yes	No	Yes
	Veteran	None	No	No	No	No
		Chapter 30	No	No	No	No
		Chapter 35	No	No	No	No
		Chapter 1606	No	No	No	No
		Chapter 1607	No	No	No	No
Veteran	Transferred Benefit	None	No	No	No	No
		Chapter 30	No	No	No	No
		Chapter 35	No	No	No	No
		Chapter 1606	No	No	No	No
		Chapter 1607	No	No	No	No
	Veteran	None	Yes	No	No	No
		Chapter 30	Yes	Yes	No	Yes
		Chapter 35	Yes	No	No	No
		Chapter 1606	Yes	Yes	No	Yes
		Chapter 1607	Yes	Yes	No	Yes