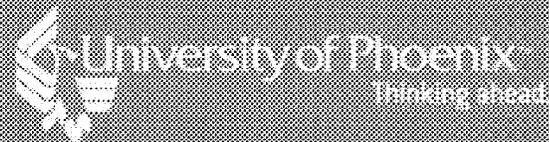


Excerpts, selected by the HELP Committee, from a larger document
produced by the company



Enrollment Counselor Guide
School of Advanced Studies



Confidential AGI0015036

Using Proper Greetings

Apollo Group Inc.

August 2006

In the interest of ensuring that the University is represented professionally at all times, and that we are conveying a consistent message to our students, we have in place a standardized greeting for all Counselors. On all inbound calls, including internal transfers, our greeting will now be:

“Enrollment, this is _____.”

Once you’ve taken over the call from the Qualifying Center representative, this is the greeting to your new student:

“Hello, this is _____. I’m your Enrollment Counselor with University of Phoenix (or) Axia College. ”

Leaving Effective Phone Messages

Apollo Group Inc.
Effective Phone Messages
February 2006

Guide:

Messages should include:

- A warm and welcoming tone
- Student’s name
- Your phone number (twice is even better!)
- A call to action – time they can reach you

Messages should not include:

- Promotions or discounts
- Personal financial information

It’s very important to remember that the conversation starts before you pick up the telephone.

Options for First Contact (3):

1. Hi Bill this is _____, your Enrollment Counselor with the _____ programs at University of Phoenix. I've received your request for information regarding the _____ degree program and I'm sure you may have some questions about what going back to school will entail. When you return my call Bill, we can discuss your specific situation as well as the financial options that are available to you. Call me today – I am in the office until 5pm MST, and again tomorrow between 8 and 5. My direct number is (phone #). I'll look forward to your call Bill.

2. Hello Mark, this is _____, your Enrollment Counselor with the _____ programs at University of Phoenix. I have received your request for information regarding the _____ degree program. I do have a package for you; however, I do need to ask you a couple of questions to ensure I am getting the appropriate information out to you. Mark, give me a call today before 5pm or first thing tomorrow morning so I can get this to you right away. You can reach me on my direct line at (phone #). I look forward to speaking with you Mark.

3. Hi Rod, this is _____, your personal Enrollment Counselor at University of Phoenix. Congratulations on taking that first step towards reaching your educational goals. I am excited to talk to you about your educational background and earning your degree. When you call me back today, we will discuss your needs so you will be able to make an informed decision about returning to school. My direct line is (phone #) and the best time to reach me at my desk today is from 3-6. Again, Rod, this is _____ at (phone #), and I look forward to speaking with you before 6 pm today!

Options for Second Contact (3):

4. Hi Mary, this is _____ from the University of Phoenix (Business, Education etc.) School. I see you are interested in our _____ program. Give me a call back at (phone #) as I will have a couple of questions for you to determine exactly what kind of information you are looking for, so I can be sure to get the proper materials out to you. Again, you can reach me at (phone #). Look forward to hearing from you Mary!

5. Hi Bill, this is _____, your Enrollment Counselor at University of Phoenix. I did leave you a message a couple of days ago with my number and was hoping to have heard back from you today. As I mentioned yesterday, as your Enrollment Counselor, I am here to answer all of your questions. I will continue to try to reach you and look forward to speaking with you. My number is (phone #).

6. Hello Bill, this is _____, your Enrollment Counselor for the programs at University of Phoenix. I have some exciting news on different ways you're able to earn your degree! I am in the office today until 5pm MST, and again tomorrow between 8 and 5. My direct number is (phone #), and I do have 24 hour voicemail access. If you have another number where you can be reached more easily, please provide that on my voice mail and I'll be sure to return your call. I know that obtaining your degree is important to you Bill, so I will continue to try to contact you until we connect.

Options for Subsequent Contacts (4):

7. Hi Michelle, this is _____ from the University of Phoenix still trying to connect with you. Seeing as I have not heard back from you, I'm sure you have a busy schedule. When you call back, we'll certainly be able to discuss the different ways that you have to attend class based on your needs and schedule. We have options for you to attend class at our local ground campus, in an online environment, as well as a combination of both! My number is (phone #). Look forward to chatting with you today Michelle!

8. Hi Fred, this is _____ your Enrollment Counselor with the University of Phoenix. At one time, earning a degree was a goal for you. Has something changed? If you are not interested in returning to school at this time, please contact me so I can make the appropriate notes in your record. I would also be happy to meet with you to outline a personalized education plan that will make returning to school and completing your degree as convenient as possible. Call me today at (phone #).

9. Hi Tom, this is _____ calling again from University of Phoenix. I know you are interested in learning more about our _____ program, but I am having trouble connecting with you. I certainly don't want to bother you, but I definitely don't want to forget about you either... Give me a call as soon as you get this message at (phone #).

10. Hello Josh, this is _____, your Enrollment Counselor for the _____ programs at University of Phoenix. I have tried to contact you several times and have not received a return call. I am not sure whether you would like me to continue to try and reach you about your _____ degree. I would appreciate a quick courtesy call to let me know how I can assist you in your pursuit or whether I should remove you as a Bachelors/Masters candidate. Please be assured Bill, that I am committed to helping you reach your educational goals. I am in the office today until 5pm MST, and again tomorrow between 8 and 5pm. My direct number is (phone #). I look forward to helping you today or first thing in the morning!

Contacting a referral:

Hi John, this is _____, Bill Smith's College Advisor at the University of Phoenix. Bill had mentioned that you were excited about finishing your degree and that you would be an excellent candidate for our program. I would like to set up a telephone interview to get to know you a little better and help you with your educational goals; I am in the office today until 5pm MST, and again tomorrow between 8 and 5. My direct number to my office is (phone #) and I do have 24 hour voicemail access if there is a better number to reach you. I look forward to helping you today, or first thing in the morning.

APPH message:

Hi Bill, this is _____, your Enrollment Counselor for the programs at University of Phoenix. When we talked on July 3rd, you had spoken about how important it was for you to get your _____ degree in order to apply for that upper management position at work. _Please give me a call today so I can help you finish up your application _ or any other questions you may have. Bill, I am committed to helping you graduate so that you may reach the goals you have set for yourself_. Please call me today before 5pm or first thing tomorrow morning after 8am MST, so we can solidify your start date and I can get your materials to you immediately. You can reach me on my direct line at (phone #). Thanks Bill, I look forward to speaking with you!

Classic Probes & Responses

From Jim Pangborn

“Just send me some information”

- What kind of information are you looking for?
- So, you’re ready to go back to school ... tell me about that?
- Are you nervous about going back to school?
- What prompted you to call today?
- On a scale of 1-10, how important is school to you?
- What is school going to do for you at work or personally?
- How much thought have you put into returning to school?

TIP ... “Shoppers are Graduates Waiting to Happen”

Probing deeper will keep students from “camping out” in SHOP status forever. They want control of the conversation and are conditioned to keeping you at arms-length. Bring them closer with the age-old question, “How serious are you about getting your degree?”

OUTSIDE the BOX: “I’m a lot like you; I like to have a tendency to want to have all the details in front of me. The information I can send is very basic ... really my role is more of a counselor to help with your questions right now. Has anyone ever taken the time to review a degree-completion plan with you?”

“Shopping Around”

- What other schools are you looking at?
- What will be the deciding factors in your decision?
- How long have you been thinking about going back to school?
- Why is obtaining your degree important to you?
- That’s why I’m here ... to help you shop. What kind of timetable are you on?
- What do you see as my role during this “shopping trip”?
- Are you shopping for a place to graduate?
- When you first thought about returning to school, where did you start the process?
- What does your ideal school look like to you?
- How will having your degree change your life?

TIP ... “Milk, Eggs, Butter”

Students have an internal checklist. Until those two or three things are addressed they are not hearing ANYTHING else you say.

OUTSIDE the BOX: “I can appreciate that ... in fact, I’ve actually had a few students start school elsewhere and then called back to re-inquire. Returning to school is an important decision, one we take very seriously. Having a counselor like myself should help ensure that we find the right fit for you before you start.”

"Too expensive"

- Expensive compared to what?
- Is cost the biggest factor in making your decision?
- Do you know anybody who has attended University of Phoenix?
- What is your biggest reason for returning to school?
- On a scale of 1-10, how much are you willing to invest in your education?
- What are your educational goals?
- Have you looked into your company's tuition Reimbursement Program?
- What will have a degree mean to you at this time in your life?

TIP ... Don't Make Excuses for Value

Ask your students ... "When your degree hangs on the wall in a few years ... will you tell friends and family you bought the cheapest degree you could find?" Build value into cost by reminding students of the direct application and value of our real-world curriculum.

OUTSIDE the BOX: "Sure we cost a little more ... but most online programs don't offer the depth of resources that we do. From our online library to the quality of our faculty UOP has spared no expense in creating the absolute best programs and curriculum available."

If you think college is expensive ... try putting yourself through retirement without a degree.

"Going a Different Direction"

- What direction is that?
- What has prevented you from finishing your degree in the past?
- Tell me about your career goals?
- Is that going to get you to where you want to be?
- How have you been effected by not having your degree?
- Are you afraid of what kind of student you will be?

TIP: Be a Counselor, Help Them Achieve THEIR Goals

As people we have a tendency to want to put things off. 83% of our students start school within 60 days. Once they reach that point, the likelihood of them making education a priority becomes far less likely.

OUTSIDE the BOX: "I'm a lot like you ... there is NEVER really a good time to start school. Most of my students are also afraid of making the commitment of time and money. Where do you see yourself professionally in the next 4-5 years?"

"I Have No Time to Go Back to School ... Too Busy"

- Do you feel you're too busy to make education a priority?
- Tell me about your work schedule?
- Well, wouldn't you agree that's really why you need a degree?
- What will be different in a year from now?
- Is school something that you are afraid of?
- Are you able to reorganize your priorities?
- Do you work in a team environment?
- Do you control your schedule?

TIP ... They Need Us

That's why University of Phoenix exists. We have found a way to help busy working-adults find the time to finish their degree programs. That's probably why University of Phoenix has grown to be the largest private University in the world, because a lot of us are too busy for a lot of things.

OUTSIDE the BOX: "It's funny you should say that ... I've been with the University for awhile now and I hear that from time-to-time. In fact, a lot of students get so busy that they never take the time to make education a priority. On a scale of 1-10, how important is school to you?"

“I need to DROP!”

- What do you mean?
- Why is quitting school more important than graduating?”
- Who has been motivating you to quit?

TIP ... Don't Let Them Off the Hook

Extending the conversation is critical. Go back to your notes. Use success stories from other students who have felt overwhelmed. Review their perception of the homework to make sure they are not “over-posting.” Remind them that returning to school was important to them at one time ... and return to the “task” orientation of doing one thing at a time.

OUTSIDE the BOX: “I understand ... having your degree is a commitment. In fact, you may face this same feeling in your 5th class or your 10th class ... it's a common emotion to want to ease up and find some breathing room. What has changed in the last few weeks that you're willing to give up your dreams of finally finishing your degree?”

"I don't need a degree."

What do you mean?

“I'm not sure I can do this.”

What questions do you have that I have not addressed?

"Are you accredited?"

What do you know about accreditation?

“My wife is expecting a baby.”

How will that prevent you from starting school?

“I have to run this by my spouse.”

What specifics will they want to know?

“I need to THINK about this.”

What areas are you “thinking” most about right now?

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Military Division Specifics

OBJECTIVES

- Recognize who would be admissible as a military student and who is not
- Understand specific concerns of military students
- Understand our status as a Servicemember's Opportunity College (SOC) school and the Enrollment Counselors role to make sure UPX Online complies with SOC standards
- Explain value of using military training for college credit
- Understand the basic structures of the degree program(s) for this Division, along with the individualized admissions requirements of the related degree programs
- Effectively understand and communicate to students the various ways military members and their spouses have to pay for school.
- Help military members make sound financial decisions regarding tuition payments.
- Communicate differences in GI Bill, Tuition Assistance and Top Up

THE FUNDAMENTALS

Military Lead Definition

- All active duty armed services personnel, all Selective Reserve personnel (includes all Guard personnel and active Reservists—not the Individual Ready Reserve, Standby Reserve, or Retired Reserve), their spouses, and veterans. In addition, Army National Guard civilian employees, Coast Guard civilian employees, Defense Acquisition University (DAU) students requesting to enter the BSM program and members of the American Society of Military Comptrollers (ASMC).
- Simply have military spouses fax a legible copy of both sides of their military ID card to you to verify their status (DAU students are not included in the discount so they are not required to provide an ID card). In order to receive the military discount, the service member must provide the following documentation:
 1. Active duty personnel must present a copy of their DD Form 2 (Active- If not submitting Military TA Voucher).
 2. Guard and Reserve personnel must present a copy of their DD Form 2 (Reserve - If not submitting Military TA Voucher).
 3. Spouses of active duty personnel must present a copy of their DD Form 1173.
 4. Spouses of Guard and Reserve personnel must present a copy of their DD Form 1173-1.
 5. Army National Guard and Coast Guard civilian employees must present proof of their status (If not submitting Military TA Voucher).

Note: It is imperative that the expiration date of the ID card is checked and inform Financial Counselor of it expiration date.



Also, just as a rule of thumb: if a student can currently be impacted by the military (i.e. active duty, in the reserves or guard or married to active duty, reserves or guard) the student is “impacted” by the military discount.

Questions To Ask All Leads

For Military Enrollment Counselors: Understand that Military Enrollment Counselors will NOT be credited for the enrollment of any lead that is not defined as a military lead. As a Military Enrollment Counselor, ask the following questions (a “Yes” to any of the questions means the student can be worked by a Military Counselor):

- Are you currently or have you previously been affiliated with the military?
- Are you currently serving in the Selective Reserve? (This includes the Army Reserve, Navy Reserve, Air Force Reserve, Marine Reserve, Coast Guard Reserve, Army National Guard, and the Air National Guard)
- Are you the spouse of an active military or Selective Reserve member?
- Are you a civil service employee of a Special Group (See definition in Tuition section)?

UPX Online has have developed a couple of agreements with military installations where UPX Online has provided an Enrollment Counselor to work with military personnel. William Reynolds has been working Parris Island and Beaufort, SC. UPX Online has made every effort, through our systems, to ensure that leads that come in from those areas are routed to Will. However, despite best efforts, occasionally there are leads that leak through into the incorrect lead base. When leads are received from any of the zip codes listed below, these leads need to be forward to William Reynolds.

Beaufort Zip Codes: 29902, 29926, 29925, 29928, 29910, 29915, 29938,

29935, 29905, 29920, 29936, 29944, 29927, 29938

Any student who currently lives outside of the United States will be enrolled by Overseas Online Military Enrollment Counselors. These students are identified by APO or FPO addresses and/or international phone numbers. A good rule of thumb is “Where does the student sleep at night?” The Overseas Online Military Enrollment teams are managed by Don Heins and Jaime Gardea.

C A M P U S E M P L O Y E E D E V E L O P M E N T
A P O L L O C O R P O R A T E U N I V E R S I T Y

12/20/2007

Confidential AGI0015171

Apollo Group, Inc.
Document 3, Page 16

Servicemember's Opportunity Colleges

Servicemember's Opportunity Colleges (SOC) is a term used in conjunction with military students. SOC is a voluntary, non-governmental federation of accredited colleges and universities that have agreed to provide distinct educational opportunities for service members. The SOC program is managed under contract with the Defense Activity for Non-Traditional Educational Services (DANTES) for the Department of Defense.

SOC institutions employ admissions procedures ensuring access for academically qualified military members, evaluate learning gained through military experiences, award credit where applicable, evaluate nontraditional learning for credit, evaluate college transcripts for minimum credit loss, and provide flexibility in residence requirements for military members. The University of Phoenix is a member of SOC.

The Army (SOCAD), Navy (SOCNAV), Marines (SOCMAR), Coast Guard (SOCCOAST), and Army National Guard (SOCGUARD) have extended requirements to meet the needs of their specific service. Most services list member colleges under -2 and -4 designations (e.g., SOCAD-2 or SOCAD-4) to indicate that the organization listed provides associate or bachelors level programs. Again, the University of Phoenix is a member of each of these organizations, and it is important to mention this to military students.

The student's Education Service Officer (ESO) will know that SOC member schools will treat military students better. There are only approximately 1,722 member schools in SOC for 2003-2005, so it is a selling point to use in differentiating UPX Online from others. For example, Arizona State University nor Notre Dame cannot make the same claim, the University of Phoenix can, so use it as a selling point.

Military Enrollment Counselors role includes making sure the correct information is being captured from students in order to report to SOC. A SOC form (completed by the student) is required to be turned into the AIS as part of the admissions package. This is mandatory for all undergraduate students who are affiliated with the Army, Marine Corps, Navy, or Coast Guard (the Air Force does not use SOC). Any questions regarding this process should be forward to Dana McCarthy.



For more information on this subject, visit the SOC website at www.soc.aascu.org.

Military Pre-evaluations

The University of Phoenix Online offers a free pre-evaluation service to all military students. This is another extremely valuable tool for recruiting the military student. Military personnel generally have many more transferable credits than they realize, because the Department of Defense has worked diligently with the American Council on Education (ACE) in getting their military training programs evaluated for college credit.

Utilize the pre-evaluation advantage by quantifying the benefit for the student. For example, a military student that receives 30 college credits for military training has just saved \$12,660! Not to mention the value of the time and effort they've saved. However, the only way for them to take advantage of that is if they enroll.

Each branch of the service has their own way of documenting credits for members.

Army

Uses the **Army/American Council on Education Registry Transcript (AARTS)**. This document identifies the individuals' Military Occupational Specialty (MOS), any national testing they've completed (CLEP, DANTES, etc.), and ACE credit recommendations for the military training courses they have completed. The military student must request that an "institutional copy" of their AARTS transcript be forwarded to you (make sure you give them your mailing address) by submitting a DA Form 5454-R. They can obtain the form from their installation education center or at the following web site: <https://aartstranscript.leavenworth.army.mil/>.

The site gives students the opportunity to electronically request an official transcript be sent to us. University of Phoenix Online is listed as a choice in the dropdown menu. There is also a paper form to submit the request; once completed, the form should be faxed to (913) 684-2011, DSN 552-2011, or mailed to: AARTS Operations Center, 415 McPherson Avenue, Fort Leavenworth, KS, 66027-1373. Note: The individual can also print personal copies (unofficial) of their transcript via the site listed above.

Navy and Marines

Use the **Sailor/Marine American Council on Education Registry Transcript (SMART)**. The information provided by a SMART is essentially the same as with the Army's AARTS. The military student may request an "institutional copy" of their SMART through their installation Navy College Office or Marine Corps Education Center. They can also download the request form from the following web site: <https://smart.cnet.navy.mil/>. The student can request an official copy to be sent to us from the website.

University of Phoenix Online is listed as a school on the dropdown menu. If the student wants to send the request with the paper form the fax number and/or address for mailing the request is contained on the form. They should request that the SMART be sent to their UPX Online Enrollment Counselor's address. Again, the individual can also print personal copies (unofficial) of their transcript directly from the web site listed above.

Air Force

The Air Force uses the **Community College of the Air Force (CCAF)** transcript for documenting all college credit worthy training received. If the student is not located near an Air Force Base, then they can send a written transcript request including their full name, Social Security Account Number, current address including ZIP Code, and address and ZIP Code that they want the transcript to be mailed (Enrollment Counselor's address).

The letter must include their original signature, because that is the legal authorization for CCAF to release a transcript. Since the Southern Association of Colleges and Schools (SACS) regionally accredit CCAF, the Office of Admissions will evaluate the transcript just like any other transfer credits would be evaluated. For more information, the CCAF web site is www.au.af.mil/au/ccaf.

Because the Community College of the Air Force is regionally accredited, we can send a transcript request form to obtain an official copy of the transcript. The student will need to list Community College of the Air Force (located in Maxwell AFB, Alabama) as one of the schools in the Education section of the application.

Coast Guard

The Coast Guard uses the Coast Guard Transcript from the **Coast Guard Institute (CGI)** for documenting all college credit worthy training received. Before your student may request a Coast Guard Transcript, they must first have completed a CGI Form 1560/04e, Military Credit Evaluation Worksheet. If they've previously accomplished a Military Credit Evaluation Worksheet, then they can request a Coast Guard Transcript by filling out the CGI Form 1560/09 at <http://www.uscg.mil/hq/cgi/index.html>. Once at the sight, hover over "ESO" then click on "Forms". They'll need Adobe Acrobat Reader to read and fill in the forms. Once completed and printed, the forms should be mailed to the Department of Transportation, U.S. Coast Guard Institute (ve), 5900 SW 64th Street, Room 235, Oklahoma City, OK, 73169-6990. The official Coast Guard Transcript, printed on blue paper, must be mailed to your address.

You can verify receipt of the AARTS and/or SMART transcripts by looking for notes in the STD lead of Campus Tracking or in Galaxy. Make sure that the student's SSN is listed in the system so that the note can be entered. If the note of receipt is not in the system after 10 business days from the date of the confirmation email please verify the SSN and/or ask the student to reorder. If the transcript has been pulled and the SSN is not in the system the transcript will be sent to be included on the Query No Match report that is emailed to Enrollment Counselors weekly by Nancy Garcia.



Once the student has committed to a start date, it is imperative to input the students SSN in Galaxy. If the students SSN is not in Galaxy, the AART, SMARTS, CGI transcripts will not match an Query report.

Once the transcripts have been pulled the processing time is approximately 72 business hours to be scanned into WIN and an additional 72 business hours to be evaluated. This timeframe is based on the assumption that both departments are current and are not backed up in their processing.

Other Military Forms

DD Form 214

- Certificate of Release or Discharge from Active Duty. This document is provided to military personnel at the time of their separation or retirement from active duty. It is used, among other things, to document their learning experiences. This is the only document where you may accept a copy, rather than the original, because only one original is provided to the military member.

DD Form 295

- Application for Evaluation of Learning Experiences during Military Service. This form was used extensively to document learning experiences prior to separation or retirement from the military services and is still in use. However, for the most part, the transcripts listed in paragraph 5b above have replaced it. The *DD Form 295* will be phased out.

NGB Form 22

- Essentially the same information that is contained on the *DD Form 214*, but use for National Guard personnel.

Students may occasionally submit course completion certificates, AF Form 2586, and Navy Page 4's. They are fine as supporting documents (if they are dated within one year of the date of submission), but may not be used alone for granting college credit.

Military Specific Degrees

INTRODUCTION

All military students, their spouses and some veterans and military civilian employees can be enrolled by the Military Division. The Military Division enrolls these students in Business and Technology programs and in 1 specific military program. If a student who meets the military lead definition is interested in an Education or Health Care degree program, an Enrollment Counselor from Education or Health Care must enroll the student.

THE FUNDAMENTALS

There is one associate degree programs specific to the military division which is the Associate of Arts through Credit Recognition (AACR)

Associate of Arts through Credit Recognition:

1. This program has no minimum age requirement. Anyone we can enroll according to the military customer definition (Active Duty, Veteran, Spouses of active duty, Selective Reservists) can be enrolled in this program with one addition: Department of Defense employees.
 - The published tuition rate is \$250 per credit hour.
 - The Degree Completion requirements are almost identical to an AAGS (36 Gen Eds, 24 Electives) with the exception that the AACR adds COMM/299.
 - COMM/299 is the only residency requirement.
 - There are 28 areas of professional focus (for example: Aviation Technology, Biomedical Technology, Business Administration, Computer Science Technology, Criminal Justice and Electronics Technology).
 - Students may dual enroll in Bachelors program - BSM is a great transition program once AA degree is completed.
 - A pre evaluation is required for this degree program.
 - Good Candidate for AACR:
 - Needs fewer than 15 credits to graduate
 - Requires a professional focus
 - Is a resident of CA and can transfer in more credits with AACR
 - Already has many lower division credits

ACCR Professional Focus Courses

AAAPT	Aerospace Physiology Technology
AAAHM	Allied Health Management
AAAHS	Allied Health Sciences
AAAT	Aviation Technology
AABT	Business Administration
AACT	Cardiopulmonary Technology
AACST	Computer Sciences Technology
AACJ	Criminal Justice
AADLT	Dental Laboratory Technology
AAET	Electronics Technology
AAHCT	Health Care Technology
AAHT	Histologic Technology
AAME	Marine Engineering Technology
AAMES	Marine Environment Studies
AAMLT	Medical Laboratory Technology
AANMT	Nuclear Medicine Technology
AANT	Nuclear Technology
AAOEHS	Occupational/Environmental Health Services
AAORT	Operating Room Technology
AAOT	Opticianry Technology
AAPT	Pharmacy Technology
AAPIYST	Physical Therapy
AART	Radiologic Technology
AARESPTH	Respiratory Therapy
AATI	Technical Instructor
AATM	Technical Management
AATS	Technical Studies
AAULT	Urology Laboratory Technology

Military Financial Options

INTRODUCTION

One way that UPX Online gives excellent customer service military students is by offering discounted tuition to students who meet our military definition. A second way UPX Online gives excellent customer service to the military is by providing excellent counsel on how to use various opportunities available to cover the cost of tuition.

KEY TERMS - TUITION

Educational Financial Terms

- Discount (standard and special groups)
- Tuition Assistance
- Montgomery GI Bill
- Top Up

University of Phoenix Online offers a 20% discount to our military students and 25% discount to Special Groups.

- Special Groups includes the following:
 1. Coast Guard members and their spouses, Coast Guard Reservists and their spouses, and Coast Guard civilian personnel; Coast Guard (MOU)
 2. Army National Guard (MOA)
 3. Army Proving Ground in Yuma (MOA)
 4. State of Michigan (includes Army and Air National Guard) (MOA)
 5. NS Everett, WA (MOA)
 6. Members of the American Society of Military Comptrollers
 7. Ft Gordon, GA
 8. Camp Murray, WA
 9. Ft Lee, VA
- These agreements include all active duty and guard members, their spouses and civilians assigned to them who possess a valid identification card.
- For those eligible for the military discount, tuition is \$380 per credit hour (\$1,140 per course) for undergraduate courses and \$470 per credit hour (\$1,410 per course) per course for graduate courses.
- Special Group rates are \$356 per credit hour (\$1,068 per course) for undergraduate courses and \$441 per credit hour (\$1,323 per course) for graduate courses.
- For those enrolled in the AACR, tuition is \$250 per credit hour (\$750 per course).
- Students who are eligible for the military discount(s) and taking 100 or 200 level classes, GEN/300, NUR/390 or BSHS/301 are eligible for a special military tuition rate of \$250 per credit hour (\$750 per course).

- These agreements include all active duty and guard members, their spouses and civilians assigned to them who possess a valid identification card.
 - For those eligible for the 20% military discount, the tuition is
 - BSIS/M and BSIA - \$380 per credit hour (\$1, 140)
 - BSN - \$330/credit hour
 - MAED-\$372/credit hour
 - MSN- \$372/credit hour
 - MHA - \$470/credit hour
 - Special Groups Tuition is 25% off the program tuition rate
 - BSHS/M and BSHA - \$356 per credit hour
 - BSN - \$310/credit hour
 - MAED - \$349/credit hour
 - MSN- \$349/credit hour
 - MHA - \$441/credit hour

Military Discounts Table

No Discount	Standard Military 20% discount	Special Groups 25% discount
Veterans* Retirees* DAU civilians enrolling in BSM (*may be enrolled by Business and Tech EAs as well)	AD Army* AD Air Force AD USMC AD Navy* All above Reservists Air National Guard All above Spouses (*some members get 25% discount – see right)	Coast Guard Army National Guard Army Proving Grounds, Yuma, AZ State of Michigan Air National Guard NS Everett, WA Camp Murray, WA Ft Gordon, GA Ft Lee, VA All above Civilians Members of the American Society of Military Comptrollers All above Spouses
\$250/credit hour rate		\$250 AACR rate
<ul style="list-style-type: none"> Anyone already eligible for discount <u>and</u> taking 100, 200 level courses or GEN/300, NUR/390, and BSHS/301 		Anyone enrolled in AACR: <ul style="list-style-type: none"> Not eligible to receive Financial Aid Pre- Evaluation required

Tuition Assistance, GI Bill and VA benefits

THE FUNDAMENTALS

There are numerous options available for the military student to finance their education.

Tuition Assistance (TA)

The Army, Air Force, Marine Corps, and Coast Guard offer 100% Tuition Assistance (TA) to all active duty personnel. However, the government contribution is capped at \$250.00 per credit hour and annually at \$4,500. Therefore, the maximum government contribution for a three credit hour course is \$750.00.

This leaves the military student (with the standard discount) to fund the remaining \$354 for an undergraduate course and \$618 for a graduate course (plus books and registration fee) from other sources. If TA is the primary source of funding, the student will probably need assistance in finding secondary source of funding. Fortunately, the Floyd D. Spence National Defense Act for Fiscal Year 2001 now permits those students eligible for the Montgomery GI Bill to use their GI Bill educational benefits to supplement TA. This program is called **Top Up** and is a combination of Tuition Assistance and GI Bill and will be covered later in this chapter.

Montgomery GI Bill

The Veteran's Administration (VA) policy on eligibility and use of the GI Bill are much too involved to effectively explain here. The best advice would be to have students contact the VA directly (1-888-GIBILL1 (442-4551)). This phone number will automatically route the call to the appropriate regional VA processing center. Students can talk to a case manager who will explain the VA benefits. Also, students can utilize the VA's web site at www.gibill.va.gov.

The University of Phoenix has a VA Benefits Coordinator that may be reached toll free at 1-877-572-7232 and through e-mail at Veterans.Affairs@apollogrp.edu (e-fax number is (480) 379-3544). The individuals in this office will provide forms to students wishing to apply for VA education benefits, but their primary job is to certify class term dates for the VA so that students will receive their payment. UPX VA Benefits Coordinator's office certifies student enrollment via Confirmed Enrollment which means that UPX will let the VA know a student has completed a class, at the latest, by the 7th day after class has ended.

UPX VA Benefits Coordinator's office is not able to counsel students on their VA entitlement, and it is important for students to understand this before directing them

to this office. Student can also contact UPX Online's Veterans Affairs office at <http://www.phoenix.edu/military/va.asp>.

Students wishing to apply for VA benefits use either the VA Form 22-1990 (initial application) or VA Form 22-1995 (change in program) should obtain these forms from the VA Website at www.gibill.va.gov or our Veteran's Affairs office. Once completed, have the student fax the form to the UPX Veteran's Affairs Office at (480) 379-3544. If an Enrollment Counselor receives a student's form, it is important that the forms are faxed immediately to the UPX Veteran's Affairs Office.

Active duty military Veterans who have served at least 3 years, and have elected to participate in the Montgomery GI Bill, are entitled to 36 months of full time benefits. Effective October 1, 2005, the monthly rate for full time is \$1,034.00 per month, \$37,224 for the 36-month entitlement.

UPX Online students who attend school consecutively are paid the equivalent of \$1,034 per month based on the number of days they attend class and the number of days of break between classes. It is highly unlikely that a student would ever receive a check for \$1,034 under Confirmed Enrollment. A student should always check with the regional VA to determine how much money to expect per class.

Active duty military personnel who have served at least 2 years, and have elected to participate in the Montgomery GI Bill, also are entitled to benefits, but at a reduced rate.

Active duty military personnel whose enlistment contract included participation in the Army or Navy College Fund have additional benefits. Their entitlement may be anywhere from \$26,500 for two year enlistees to \$50,000 for four year enlistees in critical job specialties.

For active duty military personnel using the Montgomery GI Bill, their benefit is limited to the lesser of their entitlement or the cost of tuition. Therefore, even though the student may tell you they're entitlement is \$1,388.89 per month, they need to understand that the VA will limit their payment to the cost of tuition, \$1,056.00 (\$750.00 for students in the AACR or undergraduate students eligible for the special military tuition rate) for undergraduate courses and \$1,308.00 for graduate courses.

All UPX Online undergraduate courses qualify for full time benefits, so the active duty student would receive up to \$999.34 (\$34.46 daily rate X 29 days) for their first course in VA benefits for an undergraduate course. For every consecutive course they would receive \$1206.10 (\$34.46 daily rate X 35 days). The reason for this is because the VA pays upon 30 day increments. Our classes are 35 days so they will issue a payment for the first 30 days of class and the additional 5 day will be added to the next payment. UPX Online graduate courses qualify for full time, so a typical student should expect to receive \$1206.10 (\$33.47 daily rate X 35 days) in VA benefits for a graduate course.

Individuals who have separated or retired from the military are paid the monthly entitlement rate for each month that they are in school regardless of the cost of tuition. They may also be paid for breaks as long as the break does not exceed the period of time they're in school before the break nor the period of time they are in school after the break.

Please note that the information provided here is for the Montgomery GI Bill only (Chapter 30 of Title 38). There are still active and retired personnel that retain benefits under the old Vietnam Era Veteran's Educational Assistance Program (Chapter 34 of Title 38) and the Post Vietnam Era Veteran's Educational Assistance Program (VEAP, Chapter 32 of Title 38). Also, there is a Montgomery GI Bill for the Selective Reserve (Chapter 1606), which pays a reduced amount for Reserve personnel.

Because UPX Online Enrollment Counselors are not do experts regarding VA benefits, it is imperative that Enrollment Counselors do not counsel students regarding GI Bill benefits (other than to direct them to call VA Benefits Coordinator at 1-877-572-7232 or the Veteran's Administration at 1-888-GIBILL1 and talk to a case manager as soon as possible).

Top Up

To be eligible for the Top Up benefit, the person must be approved for federal Tuition Assistance by a military department and be eligible for MGIB-Active Duty benefits. To be eligible for MGIB benefits, the person must be an MGIB - Active Duty participant and must have served at least 2 full years on Active Duty.

A copy of the Tuition Assistance Authorization form for the course that has been signed by an authorized military official will be required. People who have not requested MGIB benefits before should submit a VA Form 22-1990 to establish eligibility.

These claims are handled differently from claims for MGIB without TA. For Top-up claims, the student will not need to check in with the school official who certifies VA benefits (The VA does not need an enrollment certification on VA Form 22-1999.). The student will not need to check for approval of the program for VA benefits; approval is not an issue.

That is because Top Up is payable for any course for which TA is payable under DOD criteria. VA determines a student's eligibility for MGIB. If a student is eligible for MGIB, the TA approval form establishes eligibility for Top Up. No certifications from the school are needed.



The first time a student uses Top Up, he or she will need to fax (1-918-781-7863) the following to the Top Up Team:

Coversheet (student's name and request for reimbursement Top Up amount)
TA voucher showing a student portion due VA form 22-1990 (or VA form 22-1995 if eligibility has been established in the past.)

The student will need to send the Top Up team a new TA voucher for each class (the VA Form 22-1990 only needs to be sent the first time).

The Top Up team will send the student a check for the amount listed in the student portion column of the TA voucher. Top Up is for tuition only and does not include books or fees.

The Navy currently offers 100% tuition assistance up to \$250 per credit hour, but for only four classes (12 total credits), or an annual ceiling of \$3,000. Naval personnel may request waivers to take additional courses.

Due to the annual cap, TA runs out after 6 courses, with the exception being that Navy TA runs out after 4 courses.

Let the student know that he or she needs to complete the TA paperwork at the installation education office or through the Education Services Officer (ESO). UPX Online Enrollment Counselor will collect the first 2 TA vouchers prior to the first course. Enrollment Counselor should send students the first 2 statements of fees, for the 2 individual TA vouchers.

Military officers incur a two-year service commitment from the course completion date, so they usually are not interested in using TA. Enlisted personnel do not incur a service commitment.



Under NO circumstances are Enrollment Counselors to contact ESOs. If Enrollment Counselors need assistance with TA, contact Brooke Kosten at x-74372. If Enrollment Counselors need assistance with any other issue related to contacting an ESO, contact Kirk Kyle at x-76490.

Students need to have completed TA forms faxed back to their Enrollment Counselors at least six days prior to the start of class. **Under all circumstances, the TA form must be provided by 5:00 PM on the Thursday before the start of class.** Since they may take up to a week to process through the military installation education office, the student needs to be encouraged to get an early start.

The government portion of TA is deferred for 60 days. Unless there's another source of funding, tuition and fees not covered by TA also must be provided at six days prior to the start of class. One exception to this is the Top Up student. UPX will allow a 45-day deferral for the student portion of the tuition for Top Up students only as long as the student submits the MGIB TDA (Tuition Deferral Agreement) stating the student has completed the steps required for Top Up and including a credit card number.

Financial Aid

This is a good option to use as a secondary source of funding for many military students. However, it is important for students to fully understand how financial works. Especially, caution students about the rules on schedule gaps. Due to frequent and unplanned deployments, military students using financial aid are at significant risk of getting themselves in a bind if they are not careful. The goal should be to make sure students are educated and aware of any possible risk..

Cash

This is a good option to use as a secondary source of funding for many military students.

Additional Sources

All of the services have additional funding sources in place for those in need. Enrollment Counselors should recommend students to contact respected resources: Army Relief Society, Navy-Marine Corps Relief Society, Air Force Aid Society, or the Coast Guard Foundation.



University of Phoenix Veterans Affairs website:
<http://www.phoenix.edu/military/va.asp>

Closing Tips

Portability

Military personnel frequently are transferred to new locations every two to three years, known as a Permanent Change of Station (PCS). This creates a great deal of difficulty in completing a degree because students have not meet the residency requirements of the new school, the new school may not have the same program you were previously in, or the new school may not be a SOC member. Attending the University of Phoenix Online removes all of those obstacles for the military student. Make sure they are aware of those disadvantages and the solution provided by the University of Phoenix Online.

Credit for Military Training

The military student may receive up to 24 semester hours of lower division elective credit for their military training. They may also receive up to 36 additional credits if their military courses satisfy general education requirements (communication arts, mathematics, science and technology, humanities, social science, additional liberal arts, or interdisciplinary requirements). This is important, because it is a the potential savings to the student ranging from \$8,112 to more than \$20,000.

Many military students will be interested in checking on the amount of credit that they may receive from a military course. Refer them to <http://www.militaryguides.acenet.edu/>. At the web site, students will need to enter the course number (or keyword of the title) and the school name (or location) to search for the course in question.

Military Discount

Make sure the military student understands their price is at least 20% less than the full price that other students pay. This alone is a savings of more than \$10,000 over the course of a 120-semester hour undergraduate program. Add the fact that many of our active duty students can take advantage of the special military rate for lower division courses (\$250/credit hour for 100 and 200 level courses).

Servicemember's Opportunity College (SOC)

Remember to explain to students that UPX Online is a member of SOC. This is a very important fact to many military students.