

ARMY EMERGENCY RELIEF



DATE OF INITIATION: 24 JULY 2020

ASSISTANCE BULLETIN NUMBER: 07-2020-2

NAME OF DISASTER: CORONAVIRUS (COVID -19)

SUBJECT: AER OFFICER GUIDANCE – HOME SCHOOLING ASSISTANCE PROGRAM, **UPDATE #1**

1. REFERENCES:

- a. Army Regulation 930-4, dated 5 May 2019
- b. Army Emergency Relief Section Reference Manual (SRM), Chapter 2, dated 15 October 2019

2. **APPLICABILITY:** These instructions apply to all Army AER Sections

3. BACKGROUND:

As a result of the COVID-19 pandemic crisis, many schools closed during the second half of Academic Year 2019/2020. As a result of these school closures, many Army parents were faced with managing their children's educational needs through home school programs. To respond to this need, HQ AER published AER Bulletin 07-2020, which established assistance guidelines to assist Soldiers and Families who may experience financial hardship and face difficulty paying the additional costs associated with purchasing home school supplies and equipment.

4. PURPOSE:

Based on the continued COVID-19 concerns, many School Districts are offering parents different options to manage the educational needs of their dependent children for the upcoming academic school year (AY 2020/2021). The most common options offered are **traditional home-schooling programs, virtual/distance learning programs or hybrid programs consisting of both a virtual/distance learning program and resident in class attendance on select days of the week.** Some Army Families may experience financial hardship and face difficulty paying the additional costs for home school supplies and equipment that is required to execute these options for the upcoming school year.

This AER Bulletin provides updated guidance on the AER Home School Assistance Program. This special category of assistance is intended to **assist parents of children who were affected by a COVID-19 school closure on or after 1 March 2020 and those who have selected the home-school, virtual/distance learning or hybrid program options for the upcoming school year (AY2020/2021).** Additionally, this guidance expands assistance to parents who were home schooling their children in grades K thru 12th prior to the COVID pandemic crisis in academic school years 2019/2020/2021.

The category is intended to assist eligible Soldiers with dependent children in grades K thru 12th with home schooling costs for specific school supplies and equipment up to \$1,500 per family, regardless of the number of requests. Requests above the \$1,500 cap will be forwarded to HQ



AER for consideration as an exception based on a valid need. The eligibility period for this special category of assistance will be retroactive back to 1 March 2020 and extend until rescinded by HQ AER. Assistance will be provided as a loan, grant or combination of both to minimize any additional financial hardship on Soldiers and Families.

5. ELIGIBILITY:

Active Duty Soldiers, U.S. Army Reserve (USAR) and Army National Guard (ARNG) Soldiers on continuous Active Duty orders for 30 consecutive days or more under Title 10, Retired Soldiers, Medically Retired Soldiers, Survivors and USAR and ARNG Soldiers (Title 10 / Title 32) in support of COVID-19 operations.

This category is focused on dependent children listed in DEERS.

6. GENERAL GUIDELINES:

- a. Assistance will be provided as a **Loan, Grant, or combination of both.**
- b. Assistance may be provided to traditional home-schooling programs, virtual/distance learning programs or hybrid programs consisting of both a virtual/distance learning program and resident in class attendance on select days of the week on or after 1 March 2020 and for academic school year 2020/2021.
- c. Assistance will be guided by **school supplies and equipment per a verified school list or syllabus of required technology items and materials needed for academic school year 2020/2021.**
- d. Repayment may be deferred for 90 days to allow time for receipt of pay and allowances.
- e. Repayment of a loan will not exceed 24 months, except when approved by HQ AER. Loan must be repaid 60 days prior to ETS, end of the reserve commitment or within 12 months after the first scheduled repayment, whichever comes first.
- f. AER Form 57, Budget Planning Sheet (BPS) is required for all assistance requests.
- g. Soldiers who find themselves in a situation where repayment of a loan is causing a financial hardship should contact HQ AER for further guidance.

7. RESPONSIBILITIES:

- a. **HQ AER Assistance Section.**
 - 1) Establish Special Event Code (STAT A) for assistance request and inform AER Sections.
 - 2) Establish secure portal instructions for AER Officers to send and receive application information from Leaders, Soldiers, and Families.
 - 3) Upon notification by AER Section, review assistance requests and process EFT transactions in coordination with HQ AER Accounting Section in a timely manner.
 - 4) Provide weekly reports on the number of Soldiers and Families assisted under the established STAT A Code.

- 5) Receive feedback from AER Sections on any procedural improvements that are required.

b. HQ AER Accounting Section.

- 1) Process EFT transactions in a timely manner upon receipt of signed AER Form 52 (AER check and Promissory Note) and completed AER Form 575, AER Electronic Funds Transfer (EFT) Authorization Form.
- 2) Provide feedback to the Assistance Section of any rejected EFT transactions and reason.

c. HQ AER Loan Management Section.

- 1) Establish repayment schedule IAW AER Form 52 by allotment or EPAY using bank information provided on AER Form 575.
- 2) Ensure repayment ends not later than 12 months after repayment begins or 60-days prior to end of reserve commitment, whichever comes first.
- 3) Contact applicant, chain of command and AER Officer for repayment issues (i.e. account closed, payment disputed, etc.).
- 4) Monitor and report delinquent loan payments by installation to Director, AER.
- 5) Execute collection actions on loans past due 30 plus days.

8. PROCEDURE:

a. Routing of assistance requests:

- 1) Assistance requests received from Soldiers (**Active Duty, AGR and Title 10 for more than 30 consecutive days**) will follow the existing Direct Access guidelines for assistance case processing. **If eligible for Direct Access, no COC involvement required; if not eligible for Direct Access, COC involvement is required.**
- 2) Assistance requests received from Retired Soldiers, Survivors and eligible Family members will be processed under normal AER application processing guidelines for these respective individuals.
- 3) Assistance requests from **ARNG** and **USAR** Soldiers activated in support of COVID-19 relief efforts will be routed through the **Company Commander or First Sergeant** for review and concurrence.

b. Soldier or eligible Family Member with Special Power of Attorney (SPOA).

- 1) Inform Company Commander or First Sergeant as applicable IAW paragraph 8 a(1-3) above.
- 2) Electronically forward all required AER application information and the supporting documentation listed below in paragraph 8 c(12) below to the Unit COC for review, validation and signature, as applicable.

NOTE: Soldiers who are eligible for Direct Access and a Spouse with Special Power of Attorney (SPOA) should contact the local AER Section for guidance and may forward AER application information directly to the local AER Officer.

c. Company Commander or First Sergeant as required by paragraph 8(a) above will:

- 1) Validate that a valid financial need exists for school supplies and equipment to support school options offered and / or selected by parents in accordance with 6(c) above.
- 2) Review Soldier and Spouse (if applicable) income sources and complete AER Form 57, Budget Planning Sheet (BPS), to determine the overall financial situation.
- 3) If AER assistance is required, verify school supplies and required technology item amount(s) up to \$1500 per family.
- 4) Review documentation to verify school closing, dependency and enrollment in grades K thru 12, i.e. Military ID Card, School enrollment forms, DEERS snapshot, etc.
- 5) Ensure Soldier completes AER Form 101, Application for Financial Assistance **(Active Duty, AGR, and USAR and ARNG on Title 10 more than 30 consecutive days)**, itemizing specific needs in block 17.
- 6) After Soldier completes AER Form 101, ensure expenses are itemized in block 17, the need is explained in block 19 and date / sign the application in blocks 21 thru 24.
- 7) Ensure Soldier completes AER Form 770, Application for AER Assistance, Exception to Policy for Eligibility **(USAR and ARNG Soldiers, Title 10 and Title 32 in support of COVID-19 operations)**, itemizing specific needs in block 24.
- 8) After Soldier completes AER Form 770, ensure the application is dated/signed in blocks 29 (a-h).
- 9) **Certify the Soldier is in “good standing” and has at least 24 months remaining on his/her reserve component commitment. A certifying statement is required to be written in block 29b on AER Form 770.**
- 10) Ensure Soldier completes AER 575, Electronic Funds Transfer (EFT) Authorization Form.
- 11) Contact the nearest Army AER Section, or if within a 50-mile commuting radius other service Military Aid Society (Air Force, Navy/Marine Corps or Coast Guard) for application processing instructions based on social distancing guidelines,.
- 12) Forward AER application with supporting documentation listed below to the nearest AER Section or Military Aid Society Office for review, evaluation and assistance consideration:
 - Completed AER Form 101, Application for Financial Assistance, as applicable
 - Completed AER Form 770, Application for Financial Assistance, Exception to Policy for Eligibility, as applicable
 - Completed AER Form 57, AER Budget Planning Sheet (BPS)
 - Completed AER Form 575, AER Electronic Funds Transfer (EFT) Authorization
 - Leave and Earning Statement (LES) and other earning statements for the Soldier and Spouse, as applicable
 - School supply list or syllabus of required technology items needed
 - Proof of closing due to pandemic crisis, if applicable
 - Proof of school options available and choice chosen by parents and/or approved by the School for AY 2020/2021
 - Proof of dependency i.e. Military ID card or DEERS Snapshot
 - Proof of resident school enrollment
 - Proof of Home School Program, if applicable
 - Trustee approval letter (if under bankruptcy)

- Special Power of Attorney (SPOA) or Allotment Authorization (AER Form 55) when a Spouse with SPOA is requesting assistance on the Soldiers behalf when unavailable
- 13) If outside of a 50-mile commuting radius of any military installation, Soldiers and Leaders should request a secure DoD Safe link to transmit application information by emailing covidrelief@aerhq.org. Upon receipt of the link, the AER application and all supporting documentation should be uploaded to the link and emailed to covidrelief@aerhq.org for review, evaluation and assistance consideration.

NOTE: a. Unit Leaders, Soldiers and Family members will ensure documents containing Personally Identifiable Information (PII) are only transmitted electronically through a secure means i.e. encrypted email, DoD Safe secure portal or other secure means.

b. A secure link can be requested from the local AER Officer or HQ AER to securely transmit documents containing PII.

d. AER Officers.

- 1) Receive, evaluate and process assistance requests in accordance with these guidelines.
- 2) Ensure widest dissemination of these instructions to Company, Battery and Troop levels at or near their respective Posts, Camps and Stations.
- 3) Provide instructions on how to process AER assistance request(s) electronically in accordance with these guidelines when “face to face” interaction is restricted for AER Staff members.
- 4) When Leaders and Soldiers request a secure link, send secure DoD safe portal links to allow them to **SEND** and **RECEIVE** application data securely.
- 5) Assist Soldiers and Leaders as necessary to verify reimbursement receipts, dependency and school enrollment(s).
- 6) Input the following case information in netFORUM:
 - a. Enter the applicable request category “**Home School Assistance**” and sub-category as applicable.
 - b. Enter STAT A Code “**COVID-19 EFT**” when funds will be disbursed via EFT by HQ AER.
 - c. Enter STAT A Code “**COVID-19 Check**” when funds will be disbursed at the local AER Section by check.
- 7) Verify client banking information is correct on AER Form 575 when funds will be disbursed via EFT by HQ AER.
- 8) Upload signed AER Form 575 into the “Case documents” icon in the Assistance Case Profile.
- 9) When uploading multiple documents, ensure AER Form 575 is titled in the following format: “**AER Form 575 - Case ID**”
- 10) Send EFT email notification for **ARNG and USAR request who are in support of COVID-19 relief efforts** to covidrelief@aerhq.org. For all other demographics forward request to assistance@aerhq.org and include the following for all requests:
 - a. CASE ID on the subject line and in the body of the email message.
 - b. The client’s preferred email address in the body of the email message.

- c. Recommended repayment terms in the body of the email message.

9. MANDATORY DOCUMENTS:

- a. AER Form 101, Application for AER Assistance, as applicable
- b. AER Form 770, Application for AER Assistance, Exception to Policy for Eligibility, as applicable
- c. AER Form 57, Budget Planning Sheet (BPS)
- d. AER Form 575, Electronic Funds Transfer (EFT) Authorization Form
- e. Leave and Earning Statement (LES) and other earning statements for the Soldier and Spouse, as applicable.
- f. School Supply list or syllabus listing the required supplies and equipment
- g. Supporting documentation to show school closing, dependency, school enrollment with selected option and/or Home School program, as applicable.
- h. **ARNG and USAR Soldiers will require a certification statement on AER Form 770 (Block 29b) from the Company Commander or First Sergeant validating the Soldier is in "good standing" and has at least 24 months remaining on his/her reserve component commitment.**
- i. Trustee approval letter (if under bankruptcy)
- j. Special Power of Attorney (AER Form 53 or civilian equivalent) or Allotment Authorization (AER Form 55) when Soldier is not available.

10. This change of AER policy is retroactive back to 1 March 2020 and remains in effect until rescinded by HQ AER.

11. The point of contact for the bulletin is Ms. Danna Butterfield at (703) 602-9951 / email: danna.butterfield@aerhq.org or CSM(R) Charles Durr, (703) 601-2771 / email: assistance@aerhq.org.

12. If you require additional guidance or have specific questions during non-business hours, please contact an HQ AER caseworker through the Army Operations Center at 703-697-0218.

C. Eldon Mullis

C. ELDON MULLIS
COL, USA, Retired
Deputy Director and Chief Operating
Officer

Enclosures:

- 1. AER Form 101, Application for Financial Assistance (Fillable)
- 2. AER Form 770, Application for Financial Assistance, Exception to Policy for Eligibility (Fillable)
- 3. AER Form 57R, AER Budget Planning Sheet (Fillable)
- 4. AER Form 575, AER Electronic Funds Transfer (EFT) Authorization (Fillable)