

Sam Hodges's Issues with Transfer of Education Benefits

Background:

Sergeant Major Sam Hodges served in the US Army for twenty years before he retired in 2011. He started his career in the military in 1990 and accrued full Montgomery GI Bill benefits, which he used to finish his bachelors degree in 2002. By that time, the war in Afghanistan prompted him to continue his active duty service. By his retirement in March of 2011, SGM Hodges had completed three, yearlong combat tours in Afghanistan.

SGM Hodges was informed in 2011 that he had earned full Post-9/11 GI Bill benefits, and that they would be transferred to his children for their postsecondary use. His commanding officers, however, never mentioned that he must transfer his benefits while still in active service—though they were aware of his intention—and DoD records indicated that he had full benefits waiting for his children's use. SGM Hodges was not allowed to personally enter his intention in milConnect, and his unit commanding officer did not properly file his intention either.

Key Issues:

- The Department of Defense misinformed SGM Hodges of the extent of his Post-9/11 GI Bill eligibility.
- SGM Hodges chose to remain in the armed services in order to accrue full Post-9/11 GI Bill benefits, and to qualify for the transferal of these benefits for his children.
- SGM Hodges' commanding officer violated protocol by not allowing him to personally sign over his education benefits to his dependents.
- This transfer of education benefits was not done correctly, and therefore not while SGM Hodges was active in the armed services.
- The Army Review Board of Corrections is almost three years late on addressing his duty status claim, which would allow the Department of Veterans Affairs to utilize whatever benefits are left to SGM Hodges.
- However, VA Policy allows a maximum of 48 months of education benefits, directly contradicting what DoD actively told SGM Hodges.
- Because of DoD's promise, which he trusted, SGM Hodges had not planned an educational IRA, because full Post-9/11 GI Bill benefits would have made them unnecessary. He has come out of retirement in order to cover the costs of his family's education, devastating his family's finances.

Conclusion:

The Department of Defense is not accurately tracking the eligibility of benefits for soldiers, actively misleading Servicemembers. Without remedying DoD's understanding of VA policy, this misleading information will lead many more soldiers to believe they have additional benefits, and these soldiers will plan for their families' postsecondary education with these additional benefits in mind.

And just like SGM Hodges, once these soldiers' families enroll in higher education, they will find that VA will not cover the cost, forcing these soldiers to pay out-of-pocket, drastically devastating the financial situations of these military families.