VOLUME 7A, CHAPTER 9: "ACTIVE DUTY ENLISTED MEMBERS ENLISTMENT, REENLISTMENT, AND RETENTION BONUSES"

SUMMARY OF MAJOR CHANGES

All changes are denoted by blue font.

Substantive revisions are denoted by an asterisk symbol (*) preceding the section, paragraph, table, or figure that includes the revision.

Unless otherwise noted, chapters referenced are contained in this volume.

Hyperlinks are denoted by bold, italic, blue, and underlined font.

The previous version dated October 2014 is archived.

PARAGRAPH	EXPLANATION OF CHANGE/REVISION	PURPOSE
090206	Updated the Duration of Authority to December 31, 2015.	Revision
090309	Updated the Duration of Authority to December 31, 2015.	Revision
090406	Updated the Duration of Authority to December 31, 2015.	Revision
090505	Updated the Duration of Authority to December 31, 2015.	Revision
090605	Updated the Duration of Authority to December 31, 2015.	Revision
090704	Updated the Duration of Authority to December 31, 2015.	Revision
090805	Updated the Duration of Authority to December 31, 2015.	Revision
Bibliography	Updated Statutes.	Revision

Table of Contents

		., CHAPTER 9: "ACTIVE DUTY ENLISTED MEMBERS EN ENT, AND RETENTION BONUSES"	
0901		VERAL	
0701	OLI		¬
0902	ENL	JSTMENT BONUS	4
0902	201.	Eligibility	
0902		Amount	
0902	203.	Computation	<i>6</i>
0902	204.	Method of Payment	
0902	205.	Repayment	
*090	0206.	Duration of Authority	
0903	SEL	ECTIVE RETENTION BONUS (SRB)	7
0903	301.	Eligibility	
0903	302.	Limitations	
0903	303.	Amount	9
0903	304.	Computation	9
0903	305.	Method of Payment	9
0903	307.	Reduction and Termination of Awards	10
0903	308.	Repayment	10
*090	0309.	Duration of Authority	11
0904	CRI	TICAL SKILL RETENTION BONUS (CSRB)	11
0904	401.	Eligibility	11
0904	402.	Limitations	
0904	403.	Amount	
0904	404.	Method of Payment	
0904	405.	Repayment	
*090	0406.	Duration of Authority	
0905	PRIC	OR SERVICE ENLISTMENT BONUS	12
0905	501.	Eligibility	12
0905	502.	Amount	
0905	503.	Method of Payment	
0905	504.	Repayment	
*090	0505.	Duration of Authority	
0906	MIL	ITARY OCCUPATIONAL SPECIALTY CONVERSION BONUS	14
0906	501.	Eligibility	14
0906	502.	Amount	

Table of Contents (Continued)

090603.	Method of Payment	15
090604.	Repayment	15
*090605.	Duration of Authority	15
0907 BON	US FOR TRANSFER BETWEEN MILITARY SERVICES	15
090701.	Eligibility	15
090702.	Amount and Method of Payment	
090703.	Repayment	
*090704.	Duration of Authority	
0908 BON	US FOR TRANSFER BETWEEN COMPONENTS OF A	MILITARY
SERVICE		17
090801.	Eligibility	17
090802.	Amount and Method of Payment	18
090804.	Repayment	18
*090805.	Duration of Authority	18
*RIBI IOGR	ΔΡΗΥ	19

CHAPTER 9

ACTIVE DUTY ENLISTED MEMBERS ENLISTMENT, REENLISTMENT AND RETENTION BONUSES

0901 GENERAL

*060101. This chapter establishes policy guidance pertaining to active duty enlistment, reenlistment, and retention bonuses.

*060102. Authoritative Guidance

This chapter is in accordance with the references listed in the Bibliography.

0902 ENLISTMENT BONUS

The Enlistment Bonus criteria contained in this section reflect the transition to *Title 37 United States Code (U.S.C.)*, *Chapter 5 Subchapter II* effective October 1, 2013. Any contracts executed on or before September 30, 2013 should be paid under *37 U.S.C. Chapter 5*, *Subchapter I* until the expiration of those respective contracts. Entitlement criteria for 37 U.S.C. Chapter 5, Subchapter I are outlined in the August 2012 version of Volume 7A, Chapter 9.

090201. Eligibility

An enlistment bonus is authorized for individuals who enlist in a Military Service for a specific period and, if applicable, for service in a military skill that is experiencing critical personnel shortages as designated by the Secretary of the Military Department concerned. The individual must:

- A. Possess a high school diploma, a completion or attendance certificate in lieu of a high school diploma, or a General Educational Development program certificate;
- B. Be an initial enlistee, a prior Military Service enlistee, or a reservist not on active duty who enlists in a Regular Component of the Military Service as defined below:
- 1. <u>Initial/Non-prior Service Enlistee</u>. An Initial or Non-prior Service Enlistee is a person who has either never served or has served, and was released from such service before completing the basic training requirements of the Service of which the person was a member and the service was characterized as either honorable or uncharacterized.

- 2. <u>Prior Military Service Enlistee</u>. A Prior Military Service Enlistee is a person who has prior military experience but has not previously received an enlistment or reenlistment bonus or who currently is not entitled to a Selective Retention Bonus (SRB) under section 0903, or a Critical Skill Retention Bonus (CSRB) under section 0904, or a Prior Service Enlistment Bonus under section 0905;
- C. Enlist for at least 2 years or extend an initial period of obligated service to a total of at least 2 years in a Regular Component of a Military Service and serve for a specified period of obligated service in at least one of the following categories:
 - 1. A designated military skill,
 - 2. Career field,
 - 3. Unit. or
 - 4. Grade,
- D. Execute a written agreement with the Secretary of the Military Department concerned that specifies the:
 - 1. Amount of the bonus,
- 2. Method of bonus payment lump sum amount or periodic installments,
 - 3. Period of obligated service,
- 4. Designated military skill or specialty, career field, unit, or grade, or such other condition or conditions of service imposed by the Secretary of the Military Department concerned;
- E. Not have previously received an enlistment or reenlistment bonus, a retention bonus, an affiliation bonus, or a transfer bonus for the same period of service;
- F. Not have previously received and not be eligible to receive an SRB under section 0903 or a CSRB under section 0904;
- G. Successfully complete training and become technically qualified in a designated skill if completion of such training and technical qualification forms the basis under which the bonus is paid; and
- H. Meet any additional military service specific eligibility criteria and quality standards established by the Secretary of the Military Department.

090202. Amount

The Secretary of the Military Department concerned will determine the amount of the enlistment bonus awarded for a designated military skill. The bonus payment for a designated military skill or cumulative amount of enlistment bonuses to any individual is not to exceed \$40,000.

090203. Computation

The Secretaries of the Military Departments are required to establish rules of computation for enlistment bonuses.

090204. Method of Payment

- A. The bonus may be paid either in periodic installments or a single lump sum. The timing of the initial payment is at the discretion of the Secretary of the Military Department concerned, except that it must not be paid before the member completes basic recruit training. For individuals enlisted for specialties requiring formal training, the Service concerned may withhold the initial payment until the individual completes the training and qualifies in the military skill, so that the bonus serves as an incentive to complete the training needed to qualify in the skill.
- B. Members with prior military service who do not require formal training to be technically qualified in the skill for which the bonus is being paid must be paid the first installment no earlier than 30 days after arrival at the first permanent duty station following reentry to active duty.
- C. If paid in installments, after the initial payment, the remainder of the bonus must be paid in equal periodic installments.

090205. Repayment

- A. A member who does not complete the term of enlistment or extension of enlistment or who is not technically qualified in the skill for which the bonus was paid will be subject to the repayment provisions of Chapter 2.
- B. A member who is discharged 12 months or less before the expiration of enlistment or extension of enlistment may be considered to have completed the terms of enlistment or extension of enlistment for which the bonus was paid. The Military Departments will determine and advise when repayment is required, since this 12-month rule is not applicable to all early discharges.

*090206. Duration of Authority

Unless authorized by Congress, no agreement under this section may be entered into after December 31, 2015.

0903 SELECTIVE RETENTION BONUS (SRB)

The SRB criteria contained in this section reflect the transition to 37 U.S.C., Chapter 5 Subchapter II effective October 1, 2013. Any contracts executed on or before September 30, 2013 should be paid under 37 U.S.C. Chapter 5, Subchapter I until the expiration of those respective contracts. Entitlement criteria for 37 U.S.C. Chapter 5, Subchapter I are outlined in the August 2012 version of Volume 7A, Chapter 9.

090301. Eligibility

An SRB provides a monetary incentive to retain sufficient numbers of qualified enlisted personnel in critical military skills, grades, or units for a specific period as designated by the Secretary of the Military Department concerned. The member must:

- A. Serve in a pay grade E-3 or higher;
- B. Reenlist for a period of at least 3 years or voluntarily extend an enlistment for a period of at least 1 year on active duty;
- C. Execute a written agreement with the Secretary of the Military Department concerned that specifies the:
 - 1. Amount of the bonus,
- 2. Method of bonus payment lump sum amount or periodic installments,
 - 3. Period of obligated service,
- 4. Designated military skill, career field, unit, or grade, or such other condition or conditions of service imposed by the Secretary of the Military Department concerned:
- D. Agree to serve for a specified period in at least one of the following reenlistment or extension categories:
 - 1. A designated military skill,
 - 2. Career field,
 - 3. Unit, or
 - 4. Grade,
- E. Meet skill qualification prior to payment of the SRB for a member transferring into a designated military skill;

- F. Qualify under any additional eligibility criteria prescribed by the Secretary of the Military Department concerned; and
- G. Not be in receipt of an enlistment bonus, a retention bonus, an affiliation bonus, or a transfer bonus for the same period of service.
- H. Meet any additional military service specific eligibility criteria and quality standards established by the Secretary of the Military Department.

NOTE: The Secretary of Defense may waive the eligibility requirements when a member of the Armed Forces reenlists or voluntarily extends enlistment as described in this section while serving on Active Duty in Afghanistan, Iraq, or Kuwait in support of Operation Enduring Freedom or Operation New Dawn.

090302. Limitations

- A. A re-entry or reenlistment must occur no later than 3 months (or within a lesser period if so prescribed by the Secretary of the Military Department concerned) after the date of discharge or release from active duty.
- B. Veterans with more than a 3-month but less than a 4-year break in active duty may qualify for a broken service, or a prior service re-entry, SRB program in accordance with regulations prescribed by the Secretary of the Military Department concerned. For SRB purposes, a member who reenlists in the Navy more than 24 hours but less than 4 years after discharge or release from active duty must be considered a Navy veteran with broken service. The 24-hour period begins on the day following the date of discharge or separation. For reenlistees reentering active duty with a break in active duty greater than 24 hours, only the original Defense Department (DD) Form 214, Certificate of Release or Discharge from Active Duty, (copy 1 or copy 4) or a reproduction of the DD Form 214, with a certified true-copy stamp and appropriate Federal Government authenticating seal imprinted thereon, is acceptable documentation and identification.
- C. Members with prior enlisted service and subsequent service as an officer, who were discharged or released from active duty and who, within 3 months after discharge or release from active duty as an officer, reenlist in the same Regular Component of a Military Service in which they previously served as an enlisted member may be eligible for an SRB. The individual must meet all other requirements established in paragraphs 090301 and 090302.
- D. Two or more extensions may not be combined to gain eligibility for SRB. Additionally, eligibility gained through an extension may not be increased by future extensions.
- E. Members who reenlist or voluntarily extend an enlistment to obtain sufficient obligated service to participate in a program leading to commissioned or warrant officer status are not eligible for SRB.
- F. A member is not eligible for an SRB if the member was discharged or released from active duty or service in an active status based upon a determination of misconduct, substandard duty performance, or moral or professional dereliction.

- G. An SRB may not be paid to an enlisted member who has completed more than 20 years of active duty or service in an active status, or who will complete a total of 24 years of service before the end of the period of active duty or active status for which the bonus is offered.
- H. Generally, a member may not use any preexisting period of obligated service to satisfy an obligated service requirement under an SRB agreement, unless such service is determined by the Secretary of the Military Department concerned to be consistent with the requirements of 37 U.S.C. § 371 and:
- 1. Such preexisting period of obligated service is necessary for the member to qualify for continuous submarine duty incentive pay and is service for which no bonus was previously authorized or payable; or
- 2. Such preexisting period of obligated service includes no more than a 2-year period of an unserved voluntary extension of enlistment for which no bonus was previously authorized or payable, and the member agrees to an additional 2-year period of obligated service in connection with the SRB.

090303. Amount

The SRB may not exceed \$25,000 for each year of obligated service in a Regular Component. The maximum amount for an SRB is \$100,000.

- A. The Secretary of the Military Department concerned must determine the amount of the SRB based on a business case model that targets the retention of adequate levels of enlisted personnel in a reenlistment or extension category.
- B. Members may receive more than one SRB for a career, but the total combined SRB payments over a career must not exceed \$200,000.
- C. SRB amounts may be prorated for extension requests greater than one year and reenlistments greater than 3 years. The additional service time will be calculated on a monthly basis at a rate equal to 1/12th the annual amount. Total bonus amounts are limited to \$100,000.

090304. Computation

The Secretaries of the Military Departments are required to establish and publish the rules for computing for SRB.

090305. Method of Payment

The bonus may be paid either in periodic installments or a single lump sum. If the Secretary of the Military Department concerned elects to pay SRBs in installments:

- A. The installment amount will be at the discretion of the Secretary of the Military Department concerned, and may be paid at the time of reenlistment, or at the beginning of the member's service commitment for the voluntary extension of enlistment. All payments must be made before the member completes a total of 24 years of service.
- B. An initial installment to a member who reenlists after a break in active duty service greater than 24 hours is to be made no earlier than 30 days after arrival at the first permanent duty station following reenlistment.
- C. Where there is lost time, the subsequent installment payments will be delayed by the number of days of lost time.
- D. Discharge for the purpose of immediate reenlistment does not affect a member's entitlement to subsequent SRB installment payments.

090306. Additional Obligated Service

Additional obligated service is defined as any active service commitment beyond an existing contractual service agreement. Existing contractual service agreements include enlistments, extensions of enlistment, and reenlistments.

090307. Reduction and Termination of Awards

- A. When a military specialty is designated for reduction or termination of an award, the effective date for reduction or termination of an award must be established and promulgated to the field at least 30 days in advance. Except as provided in subparagraph 090307.B, all awards on and after the effective date of the military specialty designated for reduction of an award will be at a reduced level, and no new awards will be made on or after the effective date in a military specialty designated for termination of award.
- B. A member who agrees to train and reenlist for military service in a skill, that at the time of that agreement is designated for an award of an SRB, may be paid a bonus for that skill at the award level in effect at the time of agreement or the award level in effect at the time of reenlistment, whichever is higher, on completion of qualification training and reenlistment in that skill, if the member is otherwise qualified for the bonus, even if that skill is no longer designated for an award of the SRB at the time the member becomes eligible for payment of the bonus.

090308. Repayment

- A. A member who does not complete the term of reenlistment or extension of reenlistment or who is not technically qualified in the skill for which the bonus was paid will be subject to the repayment provisions of Chapter 2.
- B. A member who is discharged 12 months or less before the expiration of reenlistment or extension of reenlistment may be considered to have completed the terms of

reenlistment or extension of enlistment for which the bonus was paid. The Military Departments will determine and advise when repayment is required, since this 12-month rule is not applicable to all early discharges.

*090309. Duration of Authority

Unless authorized by Congress, no agreement under this section may be entered into after December 31, 2015.

0904 CRITICAL SKILL RETENTION BONUS (CSRB)

090401. Eligibility

An enlisted member of the Armed Forces who is serving on active duty in a Regular Component, who is qualified in a critical military skill designated by the Secretary of Defense, may be paid a retention bonus as provided in this section; if the member is not serving on an indefinite enlistment, then the member reenlists or voluntarily extends the enlistment for at least 1 year.

NOTE: The member will not be paid a retention bonus if the member received a bonus or incentive pay under both 37 U.S.C. Chapter 5, Subchapter I and Subchapter II for the same activity, skill, or period of service.

090402. Limitations

- A. A retention bonus may not be given under paragraph 090401 to a member of the Armed Forces who has completed more than 25 years of active duty or who must complete the 25th year before the end of the period of active duty or active status for which the bonus is offered. This limitation does not apply with respect to a member who is qualified in a skill related to special operations forces.
- B. The Under Secretary of Defense for Personnel and Readiness (USD (P&R)) or the Principal Deputy Under Secretary of Defense for Personnel and Readiness (PDUSD (P&R)) may waive the 25-year service limitation on eligibility with respect to a member who, during a period of active duty or service in an active status, in a Reserve Component for which the bonus is being offered, is assigned duties in a skill designated as critical.
- C. CSRB payments may not be made before the start of the active duty service period for which the CSRB is being awarded, unless specifically authorized by the PDUSD (P&R).

090403. Amount

A. A member may enter into an agreement, reenlist, or voluntarily extend enlistment more than once to receive a bonus under this section. However, a member may not receive a total of more than \$200,000 in payments under this section.

B. A CSRB amount may not exceed \$30,000 unless PDUSD (P&R) has granted an exception.

090404. Method of Payment

A bonus under this section may be paid in a single lump sum or periodic installments.

090405. Repayment

- A. A member who does not complete the terms of the retention bonus or who is not technically qualified in the skill for which the bonus was paid will be subject to the repayment provisions of Chapter 2.
- B. A member who is discharged 12 months or less before the expiration of the terms of the retention bonus may be considered to have completed the terms of the retention bonus for which the bonus was paid. The Military Departments will determine and advise when repayment is required, since this 12-month rule is not applicable to all early discharges.

*090406. Duration of Authority

Unless authorized by Congress, no agreement under this section may be entered into after December 31, 2015.

0905 PRIOR SERVICE ENLISTMENT BONUS

090501. Eligibility

The Secretary of the Military Department concerned may pay an individual with prior military service who reenlists in a Regular Component of a Military Service after a break in active duty. The individual must:

- A. Enlist in a Regular Component of a Military Service;
- B. Reenlist for a period of at least 3 years or extend the initial period of obligated service to a total of 3 years;
- C. Execute a written agreement with the Secretary of the Military Department concerned that specifies the:
 - 1. Amount of the bonus.
- 2. Method of bonus payment lump sum amount or periodic installments,
 - 3. Period of obligated service,

- 4. Designated military skill or specialty, career field, unit, or grade, or such other condition or conditions of service imposed by the Secretary of the Military Department concerned;
- D. Agree to serve for a specified period in at least one of the following reenlistment or extension categories:
 - 1. A designated military skill,
 - 2. Career field,
 - 3. Unit, or
 - 4. Grade,
- E. Successfully complete training or re-training and become technically qualified in a designated military skill, when additional training is required;
- F. Not be in receipt of an enlistment bonus, a retention bonus, an affiliation bonus, or a transfer bonus for the same period of service;
- G. Provide the original DD Form 214 (copy 1 or copy 4), "Certificate of Release or Discharge from Active Duty," or a reproduction of the DD Form 214 with a certified true-copy stamp and the appropriate Federal Government authenticating seal imprinted thereon for any period of prior military service, or other official documentation verifying member's satisfactory participation for all periods of prior service in the Regular Component; and
- H. Qualify under any additional eligibility criteria prescribed by the Secretary of the Military Department concerned.
- I. Meet any additional military service specific eligibility criteria and quality standards established by the Secretary of the Military Department.

090502. Amount

The Prior Service Enlistment Bonus or the cumulative amount of enlistment bonuses will not exceed \$40,000.

090503. Method of Payment

A. The Secretary of the Military Department concerned must establish a method of payment for the bonus (lump sum or periodic installments). Payment should be disbursed based on training milestones, amounts, and length of enlistment. The Secretary of the Military Department concerned must not pay a person or member any portion of the bonus prior to completion of basic recruit training.

B. Members with prior military service who do not require formal training to be technically qualified in the skill for which the bonus is being paid will receive their first installment no earlier than 30 days after arrival at the first permanent duty station following entry on active duty.

090504. Repayment

- A. A member who does not complete the term of enlistment or who is not technically qualified in the skill for which the bonus was paid will be subject to the repayment provisions of Chapter 2.
- B. A member who is discharged 12 months or less before the expiration of enlistment may be considered to have completed the terms of enlistment for which the bonus was paid. The Military Departments will determine and advise when repayment is required, since this 12-month rule is not applicable to all early discharges.

*090505. Duration of Authority

Unless authorized by Congress, no agreement under this section may be entered into after December 31, 2015.

0906 MILITARY OCCUPATIONAL SPECIALTY CONVERSION BONUS

090601. Eligibility

The Secretary of the Military Department concerned may pay a conversion bonus to a member of the Armed Forces, who agrees to execute a written agreement to convert to, and serve for a period of not less than three years in, a military occupational specialty (MOS) for which there is a shortage of trained and qualified personnel. The member must:

- A. At the time the agreement is executed, be serving in a pay grade E-6, with not more than 10 years of service, or be serving in a pay grade E-5 or below, regardless of years of service; and
- B. Have completed all service obligations incurred for receipt of an enlistment bonus as prescribed in section 0902, a retention bonus as prescribed in section 0903, or CSRB as prescribed in section 0904.
 - C. Meet all eligibility requirements prescribed in section 090201.
- D. Execute a written agreement with the Secretary of the Military Department concerned that specifies the:
 - 1. Amount of the bonus,

- 2. Method of bonus payment lump sum amount or periodic installments,
 - 3. Period of obligated service,
- 4. Designated military skill, career field, unit, or grade, or such other condition or conditions of service imposed by the Secretary of the Military Department concerned.
- E. Not be in receipt of an enlistment bonus, a retention bonus, an affiliation bonus, or a transfer bonus for the same period of service.

090602. Amount

The bonus payment will not exceed \$4,000.

090603. Method of Payment

The bonus will be disbursed in one lump sum when the member's conversion to the MOS is approved by the chief personnel officer of the member's Armed Force.

090604. Repayment

- A. A member who does not complete the terms of the conversion bonus or who is not technically qualified in the skill for which the bonus was paid will be subject to the repayment provisions of Chapter 2.
- B. A member who is discharged 12 months or less before the expiration of the terms of the conversion bonus may be considered to have completed the terms of the conversion bonus for which the bonus was paid. The Military Departments will determine and advise when repayment is required, since this 12-month rule is not applicable to all early discharges.

*090605. Duration of Authority

Unless authorized by Congress, no agreement under this section may be entered into after December 31, 2015.

0907 BONUS FOR TRANSFER BETWEEN MILITARY SERVICES

090701. Eligibility

The Secretary of the gaining Military Department may pay a bonus to an enlisted member who agrees to transfer and serve in another Military Service, for a specified period in a designated military skill, career field, unit, or grade, or to meet some other condition or conditions imposed by the Secretary of the gaining Military Department. The member must:

- A. Execute a written agreement with the Secretary of the Military Department concerned that specifies the:
 - 1. Amount of the bonus,
- 2. Method of bonus payment lump sum amount or periodic installments,
 - 3. Period of obligated service,
- 4. Designated military skill, career field, unit, or grade, or such other condition or conditions of service imposed by the Secretary of the Military Department concerned;
- B. Agree to serve for a specified period in at least one of the following reenlistment or extension categories:
 - 1. A designated military skill,
 - 2. Career field.
 - 3. Unit, or
 - 4. Grade,
- C. Not have failed to satisfactorily complete any term of enlistment in a Military Service;
- D. Qualify for reenlistment in the Regular Component of the Military Service to which the member is transferring;
- E. Prior to the transfer, fulfill the requirements established by the Secretary with jurisdiction over the Military Service to which the member is transferring;
- F. Not be in receipt of an enlistment bonus, retention bonus, an affiliation bonus, or a transfer bonus for the same period of service.
- G. Meet any additional military service specific eligibility criteria and quality standards established by the Secretary of the Military Department.

090702. Amount and Method of Payment

The Secretary of the gaining Military Department may pay the transfer bonus in one \$10,000 lump sum amount upon approval of the transfer by the Secretary of that Military Department. Alternatively, the bonus may be paid in annual installments, the total of which may not exceed \$10,000.

090703. Repayment

- A. A member who does not complete the terms of the transfer bonus or who is not technically qualified in the skill for which the bonus was paid will be subject to the repayment provisions of Chapter 2.
- B. A member who is discharged 12 months or less before the expiration of the terms of the transfer bonus may be considered to have completed the terms of the transfer bonus for which the bonus was paid. The Military Departments will determine and advise when repayment is required, since this 12-month rule is not applicable to all early discharges.

*090704. Duration of Authority

Unless authorized by Congress, no agreement under this section may be entered into after December 31, 2015.

0908 BONUS FOR TRANSFER BETWEEN COMPONENTS OF A MILITARY SERVICE

090801. Eligibility

The Secretary of the Military Department concerned may pay a bonus to an enlisted member who agrees to transfer from the Regular Component to the Ready Reserve or vice versa of the same service. The member must:

- A. Execute a written agreement with the Secretary of the Military Department concerned that specifies the:
 - 1. Amount of the bonus,
- 2. Method of bonus payment lump sum amount or periodic installments,
 - 3. Period of obligated service,
- 4. Designated military skill, career field, unit, or grade, or such other condition or conditions of service imposed by the Secretary of the Military Department concerned;
- B. Agree to serve for a specified period in at least one of the following reenlistment or extension categories:
 - 1. A designated military skill,
 - 2. Career field,
 - 3. Unit, or

4. Grade,

- C. Not be in receipt of an enlistment bonus, retention bonus, an affiliation bonus, or a transfer bonus for the same period of service;
- D. Satisfactorily complete all terms of enlistment within their current component;
- E. Qualify for reenlistment in the Regular Component of the Military Service to which the member is transferring.
- F. Meet any additional military service specific eligibility criteria and quality standards established by the Secretary of the Military Department.

090802. Amount and Method of Payment

The Secretary of the Military Department concerned must establish the amount and method of payment for the bonus (lump sum or periodic installments). The bonus for transfer between components of a Military Service may not exceed \$10,000 and is payable upon approval of the Secretary concerned.

090804. Repayment

- A. A member who does not complete the terms of the transfer bonus or who is not technically qualified in the skill for which the bonus was paid will be subject to the repayment provisions of Chapter 2.
- B. A member who is discharged 12 months or less before the expiration of the terms of the transfer bonus may be considered to have completed the terms of the transfer bonus for which the bonus was paid. The Military Departments will determine and advise when repayment is required, since this 12-month rule is not applicable to all early discharges.

*090805. Duration of Authority

Unless authorized by Congress, no agreement under this section may be entered into after December 31, 2015.

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