

## Transferring an AmeriCorps Segal Education Award

For the most up-to-date information visit the [official AmeriCorps page](#).

The 2009 Serve America Act allows, under specific conditions, the transfer of education awards earned by members who completed approved terms of service in AmeriCorps State and National Programs.

The awards can be transferred to a member's children, foster children, or grandchildren. Prior to the enactment of the legislation, an education award could only be used by the person who successfully completed a term of national service and earned the award.

A person who earns an award by serving in an AmeriCorps program and transfers the award is referred to as the transferor. The person who receives a transferred award is the recipient.

An education award that is received through a transfer is similar to an education award that is earned by serving in an AmeriCorps program--both can be used to pay for current educational expenses at eligible educational institutions and to repay qualified student loans. However, there are some rules and regulations that apply uniquely to transferred awards. You should become familiar with these rules if you are eligible to transfer your award and are considering transferring it.

### Eligibility to Transfer Award

#### *Who is eligible to transfer an award?*

You are eligible to transfer an award if you:

- Were at least 55 years of age before beginning the term of service for which your award was earned;
- Earned the education award by successfully completing an approved term of national service in an AmeriCorps State and National Program;
- Began this term of service on or after October 1, 2009;
- Transfer all or a portion of your available award before its expiration date;
- Follow the steps in My.AmeriCorps.gov or complete the required paperwork authorizing the transfer, which includes providing information and certifying eligibility to make the transfer. Additional paperwork may be required; and
- Submit the transfer request to AmeriCorps prior to the award's expiration date.

You are not limited to the number of awards that you can transfer, but you cannot transfer more than the value of two full-time awards. This limit on the “value of education awards received” is discussed in the "Value of Education Award" section on the web page Amount, Eligibility, and Limitations. Also, your recipient(s) must be eligible to receive them.

## **Receiving an Award**

### ***Who is eligible to receive a transferred award?***

The recipient of a transferred award must be:

- The child, step-child, foster-child, grandchild, or step-grandchild of the transferor (the person who earned the award); and
- A US citizen, national, or lawful permanent resident alien.

An award recipient must be registered in My.AmeriCorps.gov to access the transferred award. Registration in My.AmeriCorps.gov requires having an email address.

While there is no minimum age for a designated recipient, a member wishing to transfer an award should transfer it to someone who can make use of it before it expires. The recipient of a transferred award will not be able to receive an extension of the time period to use the award based upon the recipient having been too young to use it.

Additionally, the recipient must not have already earned or received the aggregate value of two full time education awards. This limit on the “value of education awards received” is discussed in the "Value of Education Award" section on the web page [Amount, Eligibility, and Limitations](#).

## **Laws, Rules, and Regulations for Transferred Awards**

Most of the rules and legal provisions that govern how a person can use an award that was earned in an AmeriCorps program also apply to an award that was transferred. Transferred education awards can be used to pay for current educational expenses at eligible educational institutions and to repay qualified student loans. The web page [Use Your Education Award](#) defines these terms and explains how and where you can use your education award.

However, there are special conditions that make using a transferred award different than an award that was earned by someone who completed a term of national service.

- The recipient of a transferred award can use the award 10 years from the date the transferor completed his or her term of service--the date the award was originally earned by the person who transferred it.
- If a transferred awards is used to pay for current educational expenses, it can only be used at Title IV educational institutions. Transferred awards cannot be used to pay current educational expenses for “GI-Only programs”. (“GI-Only programs are VA approved programs that are not offered by a Title IV school.) The award can be used at GI approved programs only if the program is offered by a Title IV School.
- For more information about G.I. Only Programs, see the discussion on GI-Bill programs in the "Pay Educational Expenses" section of the web page [Use Your Education Award](#).

### **Other rules that apply specifically to transferred awards:**

- Each transferred award can only be transferred one time to one recipient. (There may be a waiver to this rule if a recipient is unavoidably prevented from using the award). If part of an award is transferred, subsequent transfers cannot be made from that same award—neither to the same recipient nor to a different recipient. For example, you cannot split up one education award between two grandchildren.
- A person who earned an award and transferred it may revoke any unused portion of the transferred award at any time up and for any reason up to its original expiration date. The unused portion will be credited back to the transferor's education award account, less any amount that has been requested by the recipient but not yet processed by an institution.
- If a recipient uses part of a transferred award but revokes the unused portion, subsequent transfers cannot be made from that original award. Each award can only be transferred one time.
- An intended recipient may decline to accept a transfer offer. In this situation, since the award has not actually transferred, the transferor can offer it to another eligible recipient. Or it can be used by the Transferor if it hasn't expired.
- A person transferring an award to a step child or step grandchild must complete an additional form called Education Award Transfer Request and Authorization which describes the "step" relationship. While it is a self-certifying form, the certification and verifications are made under penalty of federal law. To request a copy of this form, contact the National Service Hotline at (800) 942-2677.
- Education awards should only be transferred to individuals who can use them within the 10 year use period. This is because transferred awards cannot be extended due for the reason that the recipient was too young to use it.

### **How to Transfer an Award**

The easiest, fastest, and most secure way to transfer an education award is by using the online system, [My.AmeriCorps.gov](https://my.ameriacorps.gov).

#### **CREATING A REQUEST TO TRANSFER AN AWARD**

These are the steps the person who is transferring the award—the transferor—should follow.

If you have an award that is eligible to be transferred, you can initiate a request online to transfer your award by following these steps:

1. Have the necessary information available about the person to whom you plan to transfer the award—the individual's first and last names, relationship, Social Security Number, date of birth, street address, and email address, if the person has one.
2. Log into your account in My.AmeriCorps.gov.
3. On your Home page click on "My Education Award" in the left sidebar. If an award qualifies for a transfer, an option called "Create Award Transfer Request" will be displayed.
4. Select the term of service, if there is more than one, and enter the transfer amount.
5. Enter the recipient's information that is required. Read the Certification paragraph and, if you agree to it, click on the "Submit" button.
6. If the eligible recipient...

- **is already an AmeriCorps member and accepts the award online through My.AmeriCorps.gov**, the transferred amount can be added to the recipient's existing account. The recipient should look for a link at the top of his or her home page to accept or deny the transfer offer.
- **has an email address** the system will automatically forward an email to that person with the request to transfer the award. The email will contain a link to an online form "Award Transfer Accept/Decline Form". You should not click on "print acceptance form". That is only for a recipient who does not have an email address. Sending the acceptance form both electronically and by paper can cause a delay in the processing of the transfer.
- **does not have an email address**, check the box. After you submit the transfer request, you will be able to click on "print acceptance form" that allows you to print the form and mail it to the recipient. The recipient should complete that form and return it to the National Service Trust for processing.

Generally, the request will expire after 30 days if it is not accepted or declined. However, the transferor may re-transfer the award after the request to transfer has expired. The transferor may also cancel the transfer request before it is accepted. A transferor might cancel a request for many reasons. Two examples are "an incorrect amount was entered" or "the recipient's information was incorrect".

While the request to transfer an award is pending, meaning the recipient has not yet accepted the transfer, the system will prevent the transferor from accessing the amount being transferred.

The Trust monitors and facilitates each transfer.

## **ACCEPTING OR DECLINING THE TRANSFER**

These are the steps an individual who has been offered a transferred award--the recipient--should follow. There are several possible scenarios for accepting or declining a transferred award request.

- **If the recipient is already an AmeriCorps member and accepts or declines the transfer request online through My.AmeriCorps.gov:**
  1. After the transferor submits a transfer request using My.AmeriCorps.gov, a link will appear at the top of the recipient's Home Page that states: "You have an award transfer request from (transferor's name). Click here to accept or decline."
  2. The recipient must decide if he or she wants to accept the award in full, accept a portion of the award, or decline the award.
  3. If accepted, the transferred amount will be added to his or her existing account. The amount will be available for immediate use.
- **If the proposed recipient has an email address and it was provided when the transfer was requested:**
  1. The recipient will receive an email notification stating that the transferor wishes to transfer all or part of an education award. The email explains that the request will expire in 30 days if no action is taken on the request. The email contains a link to a screen where the recipient can enter information that will verify his or her identity and clicks on "submit".

2. When the recipient's identity has been verified, an Accept or Decline Award Transfer Offer form appears. The recipient completes "Part B: Recipient Information", which includes name and contact information. It also asks whether the recipient would like to accept the award in full, accept in part, or decline the award. The recipient will enter an amount if the award is accepted in part.
3. The recipient will certify and submit the electronic form. If the recipient accepts the transfer request, in whole or in part, a screen will appear where the recipient can create a secure account in My.AmeriCorps.gov. The recipient will create a User Name and Password which will be used to access his or her account in order to request a payment from the education award.
4. Using the secure login information that was created, the recipient can log into his or her account's Home Page in My.AmeriCorps.gov to become familiar with the site. The award will be available for immediate use.

- **If the proposed recipient does not currently have an email address:**

1. The proposed recipient will receive an "Accept/Decline Award Transfer Form" that the transferring individual has printed and sent. At this time, the recipient will need to create an email address in order to establish the recipient's account in My.AmeriCorps.gov.
2. The recipient verifies information already on the form and completes missing information, including the new email address. The recipient should read the certification paragraph and, if he or she agrees to it, sign the form and send it to the National Service Trust at the address on the form.
3. The Trust will send an email to the proposed recipient's email address that is provided on the form. The email will have a link to the My.AmeriCorps.gov registration/login page and instructions on how to register.
4. The recipient should register and log into his or her account to review the information and to become familiar with navigating the site. The award will be available for immediate use.

When a recipient accepts/or declines a transferred award, an email notification is sent to the transferor stating the action that was taken by the recipient.