



U.S. Department of State
Student Loan Repayment Program (SLRP)
ELIGIBILITY WORKSHEET

FY- _____ .

For you to be eligible to receive a Student Loan Repayment incentive, **your loans** must qualify, **your position** must qualify, and **you** must qualify. Providing answers to the questions on this worksheet will help determine whether and how you meet all of these tests. Complete Section 100 until you reach the point where your answer indicates ineligibility (No, Stop here.) or eligibility of your loans.

When you have completed this Section, save this document and print it as a record of the eligibility or ineligibility of your loan.

1. Name (Last, First, MI)

2. Social Security Number

Section 100: Loan Eligibility

101. Do you have (an) outstanding student loan(s) for a course of study that you have not yet completed?

☐ Yes. Answer the following questions and then go to Question #102.

Name of college or university: _____

What is your degree objective? _____

When do you expect to complete your course of study? _____

What is the amount of your outstanding student loans for this course of study at this time? _____

☐ No. Go to Question #103.

102. Do you have other outstanding student loan(s) for a course of study that you have completed?

☐ Yes. Go to Question #103.

☐ **No. Stop here. Your loans are not eligible for the Student Loan Repayment Program at this time. You may consider applying when you complete your current studies. Print this document as a record of your ineligibility.**

103. Is at least one of your outstanding student loans one of the following types?

☐ Yes. Check all that apply and go on to Question #104.

☐ Federal Family Education Loans (FFEL)

☐ Subsidized Federal Stafford Loans

☐ Unsubsidized Federal Stafford Loans

☐ Federal PLUS Loans

☐ Federal Consolidation Loans

☐ William D. Ford Direct Loan Program (Direct Loans)

☐ Direct Subsidized Stafford Loans

☐ Direct Unsubsidized Stafford Loans

☐ Direct PLUS Loans

☐ Direct Subsidized Consolidation Loans

☐ Direct Unsubsidized Consolidation Loans

☐ Federal Perkins Loan Program

☐ National Defense Student Loans (made before July 1, 1972)

☐ National Direct Student Loans (made between July 1, 1972, and July 1, 1987)

1. Name (*Last, First, MI*)

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- ☐ Perkins Loans (made after July 1, 1987)
- ☐ Loans for Disadvantaged Students (LDS)
- ☐ Primary Care Loans (PCL)
- ☐ Nursing Student Loans (NSL)
- ☐ Health Professions Student Loans (HPSL)
- ☐ Health Education Assistance Loans (HEAL)

☐ **No. Stop here. You have no loans eligible for repayment through the Student Loan Repayment Program. Print this document as a record of your ineligibility.**

104. Do you also have outstanding loans that are not one of the above types?

☐ Yes. Answer the questions below and then go to Item #105.

Today's Date (*mm-dd-yyyy*): _____

What is the type of your non-qualifying loan? _____

What is the name of the lender or loan servicing instruction for the non-qualifying loan? _____

What is the current outstanding balance for your non-qualifying loan? _____

☐ No. Go to Question #105.

105. At least one of your loans is qualifying. Go on to Section 200, Position Eligibility. Proceed for further instructions.



U.S. Department of State
Student Loan Repayment Program (SLRP)
ELIGIBILITY WORKSHEET

FY- _____ .

You need to complete Section 200 only if the result of Section 100 indicated at least one of your loans is eligible (i.e., you reach Item 105). Complete Section 200 until you reach the point where your answer indicates ineligibility (No, Stop here.) or eligibility of your position and you are asked to mark a specific box on the Request for Consideration, form DS-4038

When you have completed this Section, save this document and print it as a record of the eligibility or ineligibility of your position.

1. Name (*Last, First, MI*)

2. Social Security Number

Section 200: Position Eligibility

201. Are you already an SLRP participant?

- ☐ Yes. Go to Question #203.
☐ No. Go to Question #202.

202. Are you a permanent, Foreign Service employee?

- ☐ Yes. Go to Question #205.
☐ No. Go to Question #204.

203. Are you in the same position now as you were when you were last qualified for the SLRP? (Check the box below that describes your situation and follow the instructions in the column to the right.)

- | | |
|---|--|
| <input type="checkbox"/> I am a Civil Service employee (including those who qualified on the basis of status as a PMI) qualified in FY-03 on a pre-qualifying basis who is still in the same position as when I qualified. | Check "Yes" below and mark Box 12 a on the Request for Consideration. |
| <input type="checkbox"/> I am a Civil Service employee qualified on a case-by-case basis who is still in the same position as when I qualified. | Check "Yes" below and mark Box 12 g on the Request for Consideration. |
| <input type="checkbox"/> I am a Civil Service employee qualified on case-by-case basis who has been promoted or reassigned to position in same occupational series in the same office. | Check "Yes" below and mark Box 12 h on the Request for Consideration. |
| <input type="checkbox"/> I am a Civil Service employee (including those who qualified on the basis of status as a PMI) in a pre-qualifying position who has been promoted or reassigned to position in same occupational series. | Check "Yes" below and mark Box 12 c on the Request for Consideration. |
| <input type="checkbox"/> I am a Civil Service employee who qualified on the basis of status as a PMI, and I have converted to permanent Civil Service employee . | Check "Yes" below and mark Box 12 i on the Request for Consideration. |
| <input type="checkbox"/> I am a Foreign Service qualifying in FY-03 on a pre-qualifying basis who is still in the same position as when I qualified. | Check "Yes" below and mark Box 12 b on the Request for Consideration. |
| <input type="checkbox"/> I am a Foreign Service employee in a pre-qualifying position who extended at the same post , or has been reassigned to a different position at the same post . | Check "Yes" below and mark Box 12 d on the Request for Consideration. |
| <input type="checkbox"/> I am a Foreign Service employee, in a pre-qualifying position, and the post has been removed from the pre-qualifying list. I am still in the same position. | Check "Yes" below and mark Box 12 k on the Request for Consideration. |

1. Name (Last, First, MI)	2. Social Security Number
<input type="checkbox"/> I am a Foreign Service employee, in a pre-qualifying position, and the post has been removed from the pre-qualifying list. I am in a different position with the same skill code.	Check "Yes" below and mark Box 12k on the Request for Consideration.
<input type="checkbox"/> I am a Foreign Service employee, in a pre-qualifying position, and the post has been removed from the pre-qualifying list. I am in a different position with a different skill code.	Check "Yes" below and mark Box 12k on the Request for Consideration.
<input type="checkbox"/> I am a Foreign Service employee qualified on case-by-case basis, who is still in the same position in the same skill code and in the same office or post.	Check "Yes" below and mark Box 12 j on the Request for Consideration.
<input type="checkbox"/> I am a Foreign Service employee qualified on case-by-case basis, who has been reassigned to a different position in the same skill code and in the same office or post.	Check "Yes" below and mark Box 12 I on the Request for Consideration.
<input type="checkbox"/> I am a Foreign Service employee qualified on case-by-case basis who has extended in same position.	Check "Yes" below and mark Box 12 m on the Request for Consideration.
<input type="checkbox"/> I am a Civil Service employee qualified on case-by-case basis who has been promoted or reassigned to position in same occupational series in a different office.	Check "No"
<input type="checkbox"/> I am a Civil Service employee in a pre-qualifying position who has been promoted or reassigned to position in different occupational	Check "No"
<input type="checkbox"/> I am a Civil Service employee qualified on case-by-case basis who has been promoted or reassigned to position in different occupational series.	Check "No"
<input type="checkbox"/> I am a Civil Service employee qualified on case-by-case basis who has been promoted or reassigned to position in different occupational series in the same office.	Check "No"
<input type="checkbox"/> I am a Civil Service employee qualified on case-by-case basis who has been promoted or reassigned to position in different occupational series in a different office.	Check "No"
<input type="checkbox"/> I am a current, 2000, 2001, 2002 or 2003 PMF, who has converted to Foreign Service Employee .	Check "No"
<input type="checkbox"/> I am a Foreign Service employee in a pre-qualifying position, who has been reassigned to a different position at a different post . I am currently in transit between assignments.	Check "No"
<input type="checkbox"/> I am a Foreign Service employee, assigned to pre-qualifying position, who is expected to arrive at post no later than August 31 . I am currently in transit between assignments.	Check "No"
<input type="checkbox"/> I am a Foreign Service employee qualified on case-by-case basis, who has been reassigned to a different position in the same skill code in a different office or post.	Check "No"
<input type="checkbox"/> I am a Foreign Service employee qualified on case-by-case basis, who has been reassigned to a different position at the same post.	Check "No"
<input type="checkbox"/> Yes. Your eligibility continues. Provide the information below and go on to Section 300, Employee Eligibility. Today's Date (mm-dd-yyyy): _____ Name of your current post/office: _____ Overseas Only: Date (mm-dd-yyyy) of arrival at current post: _____ Domestic Only: Date (mm-dd-yyyy) of entry in qualifying position: _____ Title of current position: _____ Overseas Only: Expected date (mm-dd-yyyy) of departure from current post: _____ <input type="checkbox"/> No. Go to Question #204.	

204. Are you either a Foreign Service employee or a permanent Civil Service employee serving on an excursion tour at an overseas post?

- ☐ Yes. Go to Question #205.
☐ No. Go to Question #209.

205. Are you currently serving at a post designated for danger pay?

- ☐ **Yes. Your position is pre-qualifying. Mark Box 12 d on the Request for Consideration. Provide the information below and go on to Section 300, Employee Eligibility.**

Today's Date (mm-dd-yyyy): _____

Name of your current post: _____

Actual date (mm-dd-yyyy) of arrival at current post: _____

Title of current position: _____

Expected date (mm-dd-yyyy) of departure from current post: _____

- ☐ **No. Go to Question #206.**

206. Are you currently serving at a post designated for at least 15% post differential?

- ☐ **Yes. Your position is pre-qualifying. Mark Box 12 d on the Request for Consideration. Provide the information below and go on to Section 300, Employee Eligibility.**

Today's Date (mm-dd-yyyy): _____

Name of your current post: _____

Actual date (mm-dd-yyyy) of arrival at current post: _____

Title of current position: _____

Expected date (mm-dd-yyyy) of departure from current post: _____

- ☐ **No. Go to Question #207.**

207. Have you been assigned for the future to a post designated for danger pay?

- ☐ **Yes. Your position is pre-qualifying, but your arrival date may preclude participation this fiscal year. Mark Box 12 e, if appropriate, on the Request for Consideration. Provide the information below and go on to Section 300, Employee Eligibility.**

Today's Date (mm-dd-yyyy): _____

Name of your future post: _____

Expected date (mm-dd-yyyy) of arrival at future post: _____

Title of future position: _____

Expected tour of duty at future post
(e.g., one year, two years): _____

- ☐ **No. Go to Question #208.**

208. Have you been assigned for the future to a post designated for at least 15% post differential?

- ☐ **Yes. Your position is pre-qualifying, but your arrival date may preclude participation this fiscal year. Mark Box 12 f, if appropriate, on the Request for Consideration. Provide the information below and go on to Section 300, Employee Eligibility.**

Today's Date (mm-dd-yyyy): _____

Name of your future post: _____

ETA at future post: _____

Title of future position: _____

- ☐ **No. Neither your current nor your future assignment is pre-qualifying for the Student Loan Repayment Program. You are not eligible for the program. Print a copy of this document as a record of the reason for your ineligibility.**

209. Are you a permanent Civil Service employee or a non-permanent Civil Service employee with at least three years remaining to serve on your current appointment?

- ☐ Yes. Go to Question #210.
- ☐ **No. Stop here. Your position is not eligible for the Student Loan Repayment Program. Non-permanent employees with less than three years remaining to serve are not eligible for the program. Locally hired employees in positions overseas are not eligible for the program. Contractors and employees of contractors are not eligible for the program. Eligible Family Members serving on Family Member Appointments are not eligible for the program. Print a copy of this document as a record of the reason for your ineligibility.**

210. Are you serving in a position in one of the four offices listed below?

- ☐ Yes. Check the box corresponding to your office and go to Question #211
- ☐ 195110 - Verification Compliance, Nuclear Risk Reduction Center
- ☐ 100321 - Public Affairs, Media Resource Unit
- ☐ 061010 - Intelligence and Research, Current Intelligence Staff
- ☐ 010622 - Executive Secretariat, Operations Center
- ☐ No. Go to Question #212.

211. Does your work schedule require shift work on a regular basis?

- ☐ **Yes. Your position is pre-qualifying, Mark Box 12c, on the Request for Consideration. Go on to Section 300, Employee Eligibility.**
- ☐ **No. Stop here. Your position is not pre-qualifying for the Student Loan Repayment Program at this time. You are not eligible for the program. Print a copy of this document as a record of the reason for your ineligibility.**

212. Is your occupational series one of the ten series listed below?

- ☐ **Yes. Your position is pre-qualifying, Mark Box 12c on the Request for Consideration. Check the box corresponding to your occupational series and go on to Section 300, Employee Eligibility.**
- ☐ GS-080, Security Administration
- ☐ GS-510, Accounting
- ☐ GS-511, Auditor
- ☐ GS-600, range, Medical
- ☐ GS-800, range, Professional Engineer
- ☐ GS-904, Law Clerk
- ☐ GS-905, General Attorney
- ☐ GS-1101, Defense Controls Analyst
- ☐ GS-1102, Contract Specialist or Procurement Analyst
- ☐ GS-1301, Physical Science Specialist
- ☐ GS-1801, Compliance Specialist
- ☐ No. Go to Question #213.

213. Is your occupational series one of the five listed below?

☐ Yes. Check the box corresponding to your occupational series and go on to Question #214.

- ☐ GS-332, Computer Operator
☐ GS-334, Computer Specialist
☐ GS-391, Telecommunications Specialist
☐ GS-392, Communications Technician
☐ GS-2210, Information Technology Management

☐ No. Go to Question #215.

214. Are you receiving the IT SIP incentive?

☐ Yes. Your position is pre-qualifying, Mark Box 12 c, on the Request for Consideration. Go on to Section 300, Employee Eligibility.

☐ No. Stop here. Your position is not pre-qualifying for the Student Loan Repayment Program at this time. You are not eligible for the program. Print a copy of this document as a record of the reason for your ineligibility.

215. Is your occupational series one of the two listed below?

☐ Yes. Check the box corresponding to your occupational series and go on to Question #216.

- ☐ GS-1001, Foreign Language Specialist
☐ GS-1040, Interpreter/Translator

☐ No. Go to Question #217.

216. Are you qualified in an incentive language? (See 3 FAH-1 H-3171 for a list.)

☐ Yes. Your position is pre-qualifying, Mark Box 12 c, on the Request for Consideration. Go on to Section 300, Employee Eligibility.

☐ No. Stop here. Your position is not pre-qualifying for the Student Loan Repayment Program at this time. You are not eligible for the program. Print a copy of this document as a record of the reason for your ineligibility.

217. Is your occupational series one of the two listed below?

☐ Yes. Check the box corresponding to your occupational series and go on to Question #218.

- ☐ GS-303, Admin Support
☐ GS-318, Secretary

☐ No. Go to Question #219.

218. Do you have at least an Associate's degree?

☐ Yes. Your position is pre-qualifying, Mark Box 12 c, on the Request for Consideration. Provide the information below and go on to Section 300, Employee Eligibility.

Highest degree obtained: _____

College or University where degree was earned: _____

Date (mm-dd-yyyy) of degree: _____

Major/Minor subjects: _____

☐ No. Stop here. Your position is not pre-qualifying for the Student Loan Repayment Program at this time. You are not eligible for the program. Print a copy of this document as a record of the reason for your ineligibility.

219. Do you have at least a Bachelor's degree?

- ☐ Yes. Go to Question #220.
- ☐ **No. Stop here. Your position is not pre-qualifying for the Student Loan Repayment Program at this time. You are not eligible for the program. Print a copy of this document as a record of the reason for your ineligibility.**

220. Is your occupational series GS-967, Passport/Visa Specialist?

- ☐ **Yes. Your position is pre-qualifying, Mark Box 12 c, on the Request for Consideration. Provide the information below and go on to Section 300, Employee Eligibility.**

Highest degree obtained: _____

College or University where degree was earned: _____

Date (mm-dd-yyyy) of degree: _____

Major/Minor subjects: _____

- ☐ **No. Go to Question #221.**

221. Is your occupational series one of the two listed below?

- ☐ Yes. Check the box corresponding to your occupational series and go on to Question #222.
- ☐ GS-501, Financial Management
- ☐ GS-560, Budget Analyst
- ☐ No. Go to Question #223.

222. Do you have a Bachelor's Degree in Accounting, Business Administration or a related field?

- ☐ **Yes. Your position is pre-qualifying, Mark Box 12 c, on the Request for Consideration. Provide the information below and go on to Section 300, Employee Eligibility.**

Highest degree obtained: _____

College or University where degree was earned: _____

Date (mm-dd-yyyy) of degree: _____

Major/Minor subjects: _____

- ☐ **No. Go to Question #223.**

223. Is your occupational series GS-170, Historian?

- ☐ Yes. Go to Question #224.
- ☐ No. Go to Question #225.

224. Do you have a PhD in history or a related field?

- ☐ **Yes. Your position is pre-qualifying, Mark Box 12 c, on the Request for Consideration. Provide the information below and go on to Section 300, Employee Eligibility.**

Highest degree obtained: _____

College or University where degree was earned: _____

Date (mm-dd-yyyy) of degree: _____

Major/Minor subjects: _____

- ☐ **No. Stop here. Your position is not pre-qualifying for the Student Loan Repayment Program at this time. You are not eligible for the program. Print a copy of this document as a record of the reason for your ineligibility.**

1. Name (Last, First, MI)

2. Social Security Number

225. Is your occupational series GS-201, Human Resources?

- ☐ Yes. Go to Question #226.
☐ No. Go to Question #227.

226. Do you have a Bachelor's Degree in Public Administration or a related field?

- ☐ **Yes. Your position is pre-qualifying, Mark Box 12 c, on the Request for Consideration. Provide the information below and go on to Section 300, Employee Eligibility.**

Highest degree obtained: _____

College or University where degree was earned: _____

Date (mm-dd-yyyy) of degree: _____

Major/Minor subjects: _____

- ☐ **No. Stop here. Your position is not pre-qualifying for the Student Loan Repayment Program at this time. You are not eligible for the program. Print a copy of this document as a record of the reason for your ineligibility.**

227. Are you a member of the 2002 or 2003 Presidential Management Fellows Program?

- ☐ **Yes. You are eligible to receive the repayment incentive. Mark Box 12 c, on the Request for Consideration. Provide the information below and go on to Section 300, Employee Eligibility.**

Entry-on-Duty date (mm-dd-yyyy) with U.S. Department of State _____

Bureau: _____

Position Title: _____

- ☐ **No. Stop here. Your position is not pre-qualifying for the Student Loan Repayment Program at this time. You are not eligible for the program. Print a copy of this document as a record of the reason for your ineligibility.**



U.S. Department of State
Student Loan Repayment Program (SLRP)
ELIGIBILITY WORKSHEET
FY-_____ .

You need to complete Section 300 only if the result of Section 100 indicated at least one of your loans is eligible and Section 200 indicated your position is eligible. Complete Section 300 until you reach the point where your answer indicates ineligibility (No, Stop here.) or eligibility for you.

When you have completed this Section, save this document and print it as a record of the your personal eligibility or ineligibility.

1. Name (Last, First, MI)

2. Social Security Number

Section 300: Employee Eligibility

301. Are you serving on a career or career-type appointment (with at least three years to serve before the appointments ends) in the competitive or excepted service?

- ☐ Yes. Go to Question #302.
- ☐ **No. Stop here. You are not eligible for the Student Loan Repayment Program. Print this document as a record of the reason for your ineligibility.**
- ☐ **I don't know. Stop here. You must determine if you are on an appropriate appointment before continuing. Most employees in GG (General Grade) appointments are not in qualifying career-type appointments. Employees whose appointments are for a limited period of time which do not have conversion eligibility are not in career-type appointments. Untenured Foreign Service employees, Civil Service employees hired into Pre-Assignment Centers, and Career Entry Program employees are in career-type appointments. Consult with your Executive Office HR staff to determine your appointment type before continuing with this worksheet.**

302. Are you in default on repayment of any of your qualified student loans?

- ☐ **Yes. Stop here. You are not eligible for the Student Loan Repayment Program if you are in default. You should take steps immediately to begin repayment in order to end the default status in order to become eligible. Print this document as a record of the reason for your ineligibility.**
- ☐ No. Go to Question #303.
- ☐ **I don't know. Stop here. Most loan servicing institutions have on-line options for reviewing and managing your accounts. Information available on-line will indicate the status of your loan payment history. You may be late on payments without being declared in default. Take steps immediately to determine your account status in order to take corrective steps if you are in default before continuing with this application.**

303. Have you had a discipline action of more than 5 days sustained within the past two years?

- ☐ **Yes. Stop here. You are not eligible for the Student Loan Repayment Program until you have not had a discipline action of more than 5 days sustained during the previous two years. Print this document as a record of the reason for your ineligibility.**
- ☐ No. (Note: HR/ER/CSD will verify.) Civil Service employees, go to Question #304. Foreign Service employees, go to Question #305

304. For Civil Service: If you have not yet received an Employee Evaluation, go directly to Question #306. If you have received an Employee Evaluation, was your most recent one at least at the "Fully Successful" level (for Civil Service)?

- ☐ Yes. Go to Question #306. (Note: Your supervisor or the Executive Director of your bureau must verify.)

☐ **No. Stop here. You are not eligible for the Student Loan Repayment Program. Print this document as a record of the reason for your ineligibility.**

305. For Foreign Service: Have you been referred to the Performance Standards Board directly, not as a result of the automatic referral of two low rankings in five years, within the past two years?

☐ **Yes. Stop here. You are not eligible for the Student Loan Repayment Program. Print this document as a record of the reason for your ineligibility.**

☐ No. Go to Question #306. (Note: Your supervisor or the Executive Director of your bureau must verify.)

306. Are you willing to sign a valid service agreement for an initial minimum of three years (as a first time SLRP applicant), or one year (if this is your third consecutive year qualifying for the SLRP incentive)? For a first time applicant the service eligibility date will be the last day of the "open season" application period in which you qualified, and for three years thereafter. For those extending their original service agreement by one additional year, the date will be the day after the expiration date of your three-year service commitment and for one year thereafter.

☐ Yes. Go to Question #307.

☐ **No. Stop here. You are not eligible for the Student Loan Repayment Program unless you are willing to sign a service agreement. Print this document as a record of the reason for your ineligibility.**

307. Is your request based on continued eligibility of the previous year's program? (Your answer to Question 203 must be **yes** in order to answer this questions with yes.)

☐ **Yes. You are eligible and should request consideration on the basis of your continuing eligibility. You will need to submit a copy of the completed Eligibility Worksheet with your Request for Consideration which you should complete next.**

☐ No. Go to Question #308.

308. Is your current position pre-qualified? (Your answer to one of the following question numbers on this worksheet must be **yes** in order to answer this questions with yes. 205, 206, 207, 208, 211, 212, 214, 216, 218, 220, 222, 224,226, 227.)

☐ **Yes. You are eligible and should request consideration on the basis of your pre-qualifying position. You will need to submit a completed Eligibility Worksheet with your Request for Consideration which you should complete next.**

☐ **No. Stop here. You are not eligible for this program. Print this document as a record of the reason for your ineligibility.**

PRIVACY ACT STATEMENT

AUTHORITY: 22 U.S.C. 2651a; 5 U.S.C. 301; 5 U.S.C. 5379; and EO 9397 for the SSN.

PRINCIPAL PURPOSE: To be used as a guide in determining your eligibility for the student loan repayment incentive.

ROUTINE USES: The personal information and SSN are used by the U.S. Department of State to determine eligibility for the Student Loan Repayment Program, maintain administrative records, and perform other administrative functions inherent in the administration of this program. This information may also be used within the U.S. Department of State for study purposes, such as projecting of staffing needs, and/or creation of non-identifiable statistical data for reports to the Office of Personnel Management and other Federal agencies and Congress.

DISCLOSURE: Voluntary for both personal information and your SSN. Failure to provide certain information, however, may results in denial of your application and payments(s) not being made on your behalf.