



# Discontinuing Veterans' Annual Financial Reporting Requirements (Means Test)

## Frequently Asked Questions for VA Employees

VA will discontinue the requirement for enrolled Veterans to complete an annual Financial Assessment, commonly known as a Means Test. This eliminates a Veteran's annual reporting burden. Effective March 24, 2014, we will no longer require Veterans to provide updated information. VA will simply confirm a Veterans' continued eligibility for those benefits using information obtained from the Internal Revenue Service (IRS) and Social Security Administration (SSA).

### **Why change the means test processes?**

VA continues to look for ways to improve the effectiveness and efficiency of its exceptional health care service. This change will reduce Veterans' reporting burden and enable VA to verify Veterans' eligibility for health care more quickly, reduces VA's cost to mail Veterans annual reminders of Means Test requirements and reduces the time medical facility staff spends collecting and processing Veterans' means tests.

### **How does the change benefit Veterans?**

This process change will reduce Veterans' reporting burden and enable VA to verify health care eligibility decisions more quickly.

Under the new process, Veterans will be required to have one financial assessment on file – their current file if they're already enrolled, or the assessment they provide when they apply. That assessment will be maintained and monitored by VA and updated as income changes occur. Additionally, Veterans can benefit when VA finances and manpower previously spent focusing on acquiring financial information is redirected to other services to benefit them.

There is no change in VA's long-standing policy to provide no-cost care to indigent Veterans, Veterans with catastrophic medical conditions, Veterans with a disability rating of 50 percent or higher, or for conditions that are officially rated as "service-connected."

### **How will Veterans know about the new Means Test criteria and processes?**

VA will notify affected Veterans by mail of the elimination of the requirement to complete annual Means Test forms. In addition, information will be available on VA's website and through printed materials as well as via social media.

This notification includes information about how VA will securely monitor future financial assessments (through IRS and SSA reports), that HEC will send Veterans a letter when their self-reported income on file is different from the financial information obtained from the IRS and SSA and how to respond if they disagree with the information provided by the IRS and SSA.

**What if a Veteran's income changes?**

If, at any time, the Veteran's financial status changes, the Veteran may submit an updated financial assessment. VA encourages Veterans to continue to report changes in their income information, as well as their personal information, such as address, phone numbers, dependents, next of kin, and health insurance by completing VA Form 10-10EZ, Health Benefits Renewal Form, on-line at [www.va.gov/healthbenefits](http://www.va.gov/healthbenefits), mailing it to the Health Eligibility Center, 2957 Clairmont Road NE, Atlanta, GA 30329, or by calling 1-877-222-VETS (8387).

**What if a Veteran disagrees with the information obtained from IRS and SSA?**

If information received from IRS and SSA indicates a change in the Veteran's VA health benefits may be appropriate, the Veteran will be provided comprehensive guidance on actions they may take, including submitting additional financial documentation should they disagree with the information obtained.

Consistent with VA's current income verification processes, Veterans will still have access to care during the period of review should they dispute what IRS or SSA says about their income.

**Who should Veterans contact for more information?**

Veterans may contact their local VA health care facility or call VA's toll-free number at 1-877-222-VETS (8387).

**Approximately how many Veterans does VA anticipate this new process will impact?**

VA estimates 2.1 million Veterans will be able to use these simplification efforts, which will reduce Veteran reporting burden by more than 415,730 hours annually. Based on previous data, VA estimates approximately 250,000 Veterans may not line up with information received from IRS/SSA.