

## **Elimination of Veterans' Annual Financial Reporting Requirement (Means Test)**

### **Internal Talking Points**

- Most Veterans are no longer required to complete the annual financial assessment known as a Means Test. CBO has been working with OIT to release Vista software on March 24, 2014, that will eliminate the annual financial assessment requirement for NSC and 0% SC Veterans without any special eligibility. CBO will begin mailing notification letters to Veterans affected by this change beginning the week of March 31, 2014.
- The elimination of the annual means test frees enrolled Veterans to enjoy their VA health care benefits without worrying about completing annual income assessment forms. 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 only as substantial income changes occur.
- VA will securely receive income information from the IRS and SSA to confirm their continued enrollment eligibility. CBO will contact Veterans only if the information received indicates a change in their VA health benefits may be appropriate. 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.
- Exceptions are:
  - Veterans who are applying for VA health care enrollment must supply income information when they apply.
  - Veterans who are eligible for enrollment only because their income is below an established threshold (e.g., NSC and 0% SC Veterans without any special eligibility) will:
    - Be still required to complete a means test when applying for VA health care enrollment.
    - Not be required to complete annual means test updates.
    - Be required to complete a means test at their next health care visit if their means test status is "Required" when the software is installed.
  - Veterans who complete a financial assessment to determine their eligibility for Medication Copay Exemption or Beneficiary Travel only are still subject to the annual income test renewal process. A legislative fix is required to include these Veterans into the new process.

- 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."
- 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 using VA Form 1010EZR available online or at their local medical center.
- For more information, visit [www.va.gov/healthbenefits](http://www.va.gov/healthbenefits) or contact LeRoy Garcia, Acting Associate Director, Income Verification Division, Health Eligibility Center at 404-828-5395.