

BENEFICIARY TRAVEL

1. REASON FOR ISSUE: This Veterans Health Administration (VHA) directive provides information on the Department of Veterans Affairs (VA) beneficiary travel program.

2. SUMMARY OF MAJOR CHANGES: This revised VHA directive outlines the policy and standards for the beneficiary travel program at VA medical facilities. Major changes include updates specific to:

a. The Caregivers and Veterans Omnibus Health Services Act of 2010, P.L. 111-163, dated May 5, 2010 which provided travel benefits to individuals approved and designated under 38 U.S.C. § 1720G.

b. Continuing Appropriations and Military Construction, Veterans Affairs and Related Agencies Appropriations Act, 2017 and Zika Response and Preparedness Act, P.L. 114-223, which expanded beneficiary travel eligibility to Veterans with vision impairment, a spinal cord injury or disorder, or a double or multiple amputation whose travel is in connection with care provided through a VA special disabilities rehabilitation program.

c. Veteran's travel benefits when approved for a service dog as authorized under 38 U.S.C. 1714(a) and (d) as implemented by 38 C.F.R. §§ 17.148-154.

3. RELATED ISSUES: None.

4. RESPONSIBLE OFFICE: Member Services Office (15MEM) of Veterans Transportation Program (VTP) is responsible for the contents of this VHA directive. Questions may be addressed to VHAMSVTPLeadership@va.gov.

5. RESCISSIONS: VHA Handbook 1601B.05, Beneficiary Travel, dated July 23, 2010; Operational Memorandum, Action Plan for the Office of Inspector General (OIG) Review of Alleged Beneficiary Travel (BT) Irregularities at Multiple Locations, dated December 17, 2015; Operational Memorandum, Beneficiary Travel for Compensation and Pension Exams Performed Outside the U.S., dated January 29, 2016; and Operational Memorandum, Eligibility for Beneficiary Travel for Special Disabilities Care, dated March 2, 2017 are rescinded.

6. RECERTIFICATION: This VHA directive is scheduled for recertification on or before the last working day of January 31, 2027. This VHA directive will continue to serve as national VHA policy until it is recertified or rescinded.

January 20, 2022

VHA DIRECTIVE 1601B.05

**BY DIRECTION OF THE OFFICE OF
THE UNDER SECRETARY FOR HEALTH:**

/s/ RimaAnn O. Nelson
Assistant Under Secretary for Health
for Operations

NOTE: All references herein to VA and VHA documents incorporate by reference subsequent VA and VHA documents on the same or similar subject matter.

DISTRIBUTION: Emailed to the VHA Publications Distribution List on January 20, 2022.

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APPENDIX A

BENEFICIARY TRAVEL PROGRAM GUIDE.....A-1

BENEFICIARY TRAVEL

1. PURPOSE

This Veterans Health Administration (VHA) directive provides information on Department of Veterans Affairs (VA) policy for beneficiary travel. **AUTHORITY:** 38 U.S.C. 111; 38 C.F.R. 70.1-50.

2. DEFINITIONS

a. **Attendant.** An attendant is an individual accompanying a beneficiary who is eligible for beneficiary travel and who is medically determined to require the aid or physical assistance of another person as determined by a VA clinician.

b. **Beneficiary.** A beneficiary is a person determined eligible for VHA beneficiary travel benefits, as specified in Appendix A, paragraphs 3 and 4.

c. **Claimant.** A claimant is a Veteran (or the Veteran's guardian) who received services at the hospital, clinic, or community resource that provided the services, or the person other than the Veteran who paid for the services.

d. **Clinician.** A clinician is a Physician, Physician Assistant (PA), Nurse Practitioner (NP), Certified Nurse Practitioner, (CNP), Clinical Nurse Specialist (CNS), Certified Nurse-Midwife (CNM), Psychologist, or other licensed independent practitioner acting within the scope of their practice.

e. **Common Carrier.** A common carrier is an entity that holds itself out to the public as offering transportation over land, water, or air (e.g., bus, subway, taxi, train, airplane) at set rates and that is not a rental vehicle or a special mode of transportation.

f. **Day.** For the purposes of this directive, day means a calendar day.

g. **Deductible.** A deductible is a specified amount required by law to be withheld from a VA beneficiary travel payment in some circumstances, specified in Appendix A, paragraph 6.

h. **Emergency Treatment.** Emergency treatment refers to treatment for a condition of such a nature that a prudent layperson would have reasonably expected that delay in seeking immediate medical attention would have been hazardous to life or health. This standard would be met if there were an emergency medical condition manifesting itself by acute symptoms of sufficient severity (including severe pain) that a prudent layperson who possesses an average knowledge of health and medicine could reasonably expect the absence of immediate medical attention to result in placing the health of the individual in serious jeopardy, serious impairment to bodily functions, or serious dysfunction of any bodily organ or part.

i. **Examination, Treatment, or Care.** Examination, treatment, or care refers to services provided under the medical benefits package as defined in 38 C.F.R. 17.38.

j. **Family Caregiver.** Family Caregiver is either a Primary or Secondary Family Caregiver who meets the requirements of 38 C.F.R. 71.25.

k. **Irregular Discharge.** Irregular discharge is the release of a competent patient from a VA or VA-authorized hospital, nursing home, or domiciliary care due to: refusal, neglect, or obstruction of examination or treatment; leaving without the approval of the treating health care clinician; or disorderly conduct and discharge is the appropriate disciplinary action.

l. **Medically Indicated.** Medically indicated refers to the determination by a VA or VA-authorized community health care provider that a treatment, service, or specialized mode of transportation is medically required.

m. **Nearest Appropriate Authorized VA or Community Medical Facility.** Nearest appropriate authorized VA or community medical facility refers to the closest VA or community medical facility properly equipped and staffed to provide the care and treatment medically indicated by the patient's condition.

n. **Privately-Owned Vehicle.** Privately-owned vehicle is a vehicle to include an automobile, motorcycle, aircraft, or boat operated by an individual that is personally owned or leased by the individual and is not commercially leased or rented under a rental agreement.

o. **Residence.** Residence is a legal residence or personal domicile even if such residence is seasonal. A person may maintain more than one residence but may only have one residence at a time for purposes of determining benefits for beneficiary travel. A post office box or other non-residential point of delivery does not constitute a residence.

p. **Scheduled Appointment.** For the purposes of this directive, a scheduled appointment is an appointment made by an eligible Veteran or an order entered in their medical record to receive specific examination, treatment, or care before they appeared at a VA medical facility or non VA-authorized medical facility to obtain such examination, treatment, or care.

q. **Special Mode of Transportation.** Special mode of transportation is an ambulance, ambulette, air ambulance, wheelchair van, or other mode of transportation specially designed to transport disabled persons (this does not include a mode of transportation not specifically designed to transport disabled persons, such as a bus, subway, taxi, train, or airplane). A modified, privately-owned vehicle, with special adaptive equipment or capable of transporting disabled persons is not a special mode of transportation.

r. **Terminal Condition.** Terminal condition is a condition resulting in a life expectancy of less than 6 months, as certified by a VA health care provider.

s. **Unable to Defray.** Unable to defray refers to the situation of any Veteran who:

(1) Is an enrolled or otherwise eligible Veteran who has income for the year (as defined under 38 U.S.C. 1503) immediately preceding the application for beneficiary travel that does not exceed the maximum annual rate of pension that the beneficiary would receive under 38 U.S.C. 1521 (as adjusted under 38 U.S.C. 5312) if the beneficiary were eligible for pension during that year.

(2) Is able to demonstrate that due to circumstances such as loss of employment, or incurrence of a disability, their income in the year of travel will not exceed the maximum annual rate of pension that the beneficiary would receive under 38 U.S.C. 1521 (as adjusted under 38 U.S.C. 5312) if the beneficiary were eligible for pension.

(3) Has a service-connected (SC) disability rating of at least 30%.

(4) Is traveling in connection with treatment of a SC disability.

t. **United States.** For the purposes of this directive, the United States covers the States, territories and possessions of the United States, the District of Columbia and the Commonwealth of Puerto Rico. ***NOTE: If travel begins or ends outside of the United States, that portion of the travel is not within the United States. Travel to or from a port of entry within the United States constitutes travel within the United States.***

u. **VA-Authorized Community Medical Facility.** A VA-authorized medical facility is a community medical facility where VA has approved care for an eligible beneficiary at VA expense.

v. **VA Medical Facility.** For the purposes of this directive, VA medical facility means a VA medical center, VA Outpatient Clinic (OPC), or VA Community-based Outpatient Clinic (CBOC).

w. **Veteran-Specific Carrier.** Veteran-specific carrier means a public or nonprofit entity whose function is to provide transportation assistance for Veterans and that offers transportation to Veterans at set rates and is not a rental vehicle or a special mode of transportation.

3. POLICY

It is VHA policy that all beneficiaries are provided beneficiary travel benefits in accordance with their eligibility status. Provision of beneficiary travel benefits within statutory, regulatory and VHA policy ensures the well-being of eligible Veterans.

4. RESPONSIBILITIES

a. **Under Secretary for Health.** The Under Secretary for Health is responsible for ensuring overall VHA compliance with this directive.

b. **Assistant Under Secretary for Health for Operations.** The Assistant Under Secretary for Health for Operations is responsible for:

(1) Communicating the contents of this directive to each of the Veterans Integrated Service Networks (VISN).

(2) Providing oversight of VISNs to assure compliance with this directive, relevant standards and applicable regulations.

(3) Assisting VISN Directors to resolve implementation and compliance challenges in all VA medical facilities conducting non-exempt human subjects research within that VISN

c. **Executive Director, Member Services.** The Executive Director, Member Services, is responsible for:

(1) Establishing auditing and monitoring processes that provide oversight and supports the effectiveness of VA's national beneficiary travel program.

(2) Supporting the investigation, response and prevention of detected deficiencies in VA's national beneficiary travel program and developing effective corrective action plans.

(3) Providing risk assessments (to include actions in support of the Improper Payments Elimination and Recovery Act) and in consultation with the Assistant Under Secretary for Health and Operations, developing written policies and procedures impacting VHA's beneficiary travel program.

(4) Promoting and cultivating an integrated framework of partnerships and associations to strengthen the integrity and transparency of beneficiary travel program to build trust and ensure accountability.

(5) Establishing national, regional and local committees, as needed and appropriate, that advise VHA leadership on risks and mitigation plans related to VA's beneficiary travel program operations.

(6) Providing efficient response to appropriate oversight bodies (e.g. Office of Inspector General (OIG), Government Accountability Office (GAO), Office of Management and Budget (OMB)).

(7) Consulting the Assistant Under Secretary for Health for Operation on developing written policies and procedures impacting VHA's beneficiary travel program.

d. **Veterans Transportation Program Director.** The Veterans Transportation Program Director is responsible for providing governance, expertise, leadership and oversight in accordance with VHA Directive 1217, VHA Central Office Operating Units, dated September 10, 2021, including but not limited to:

(1) Systematic oversight and resource allocation.

(2) Serving as subject-matter and technical experts for VHA beneficiary travel program.

(3) Communicating with internal and external stakeholders.

(4) Managing quality, compliance and risks.

e. **Veterans Integrated Service Network Director.** The VISN Director is responsible for:

(1) Ensuring VA medical facility Directors comply with this directive and informing leadership when barriers to compliance are identified.

(2) Ensuring VA medical facility Directors comply with the mandated actions and recommendations of the Executive Director, Member Services, in the performance and execution of beneficiary travel program operations.

f. **VA Medical Facility Director.** The VA medical facility Director, or designee, is responsible for ensuring VA medical facility staff comply with this directive.

g. **VA Medical Facility Chief of Staff.** The VA medical facility Chief of Staff is responsible for:

(1) Ensuring clinicians under their purview are appropriately utilized in determinations of the authorizing of Special Mode Transportation or, as appropriate, common carrier. See paragraph 5 for additional educational information.

(2) Ensuring clinicians under their purview are appropriately utilized in determinations of the nearest appropriate site of care for travel reimbursement purposes as appropriate. See paragraph 5 for additional educational information.

(3) Ensuring that Veterans dissatisfied with a clinical determination related to the beneficiary travel program are informed of their right to file a clinical appeal in accordance with VHA Directive 1041, Appeal of VHA Clinical Decisions, dated October 24, 2016.

(4) Ensuring VA medical facility service chiefs under their purview review and approve by signature in the patient's medical record determinations in those cases where payment of the travel allowance would be counterproductive to the therapy being provided.

h. **VA Medical Facility Associate Director for Patient Care Services.** The VA medical facility Associate Director for Patient Care Services (ADPCS) is responsible for:

(1) Ensuring clinicians under their purview are appropriately utilized in determinations of the authorizing of Special Mode Transportation or, as appropriate, common carrier. See paragraph 5 for additional educational information.

(2) Ensuring clinicians under their purview are appropriately utilized in determinations of the nearest appropriate site of care for travel reimbursement purposes as appropriate. See paragraph 5 for additional educational information.

(3) Ensuring that Veterans dissatisfied with a clinical determination related to the beneficiary travel program are informed of their right to file a clinical appeal in accordance with VHA Directive 1041.

i. **Chief, VA Medical Facility Business Office.** The Chief of the VA medical facility Business Office or designee is responsible for:

(1) Receiving and processing applications from claimants applying for beneficiary travel.

(2) Establishing auditing and monitoring processes that provide oversight and effectiveness of the VA medical facility's beneficiary travel program.

(3) Providing support in the investigation, response and prevention of detected deficiencies in the VA medical facility beneficiary travel program and developing effective corrective action plans.

(4) Providing ongoing risk assessments including appropriate actions in support of the Improper Payments Elimination and Recovery Act.

(5) Implementing reviews to verify beneficiaries listed on vendor invoices have been properly authorized for Special Mode of Transportation services or attended medical appointments prior to approving reimbursement of travel expenses or payment of Special Mode of Transportation vendor invoices.

(6) Ensuring appropriate oversight of VA beneficiary travel operations and related health administration, financial and contractual activities of the program.

(7) Ensuring appropriate staff are provided training resources and utilized in the administrative operations of the VA medical facility's beneficiary travel program. See paragraph 5 for additional educational resources.

(8) Ensuring proper actions are taken to prevent fraud, waste and abuse and reporting suspected cases to the OIG.

(9) Verifying beneficiaries attended medical appointments prior to approving payment of Special Mode of Transportation vendor invoices.

(10) Implementing controls to prevent beneficiaries using Special Mode of Transportation services from also obtaining mileage reimbursement for the same appointment(s).

(11) Establishing a designee for above responsibilities, dependent on VA medical facility structure, as appropriate.

(12) Ensuring compliance with 38 U.S.C. § 5104, Decisions and notices of decisions and 38 U.S.C. § 5103A, Duty to assist claimants, through oversight of the VA medical facility's appellate processes.

(13) Ensuring that Veterans dissatisfied with an administrative determination related to the beneficiary travel program are informed of their right to file an appeal in accordance with VHA Directive 1032, Health Benefit Appeals Processing, dated August 16, 2013.

5. TRAINING

There are no formal training requirements associated with this directive. The following beneficiary travel program resources are available and recommended by appropriately involved staff (e.g., Beneficiary Travel clerks, Beneficiary Travel supervisors/managers, social workers, clinicians) to review:

a. Veterans Transportation Program SharePoint Web site, available at: <https://dvagov.sharepoint.com/sites/VHAm/VTP/SitePages/Veterans-Transportation-Program.aspx>. **NOTE:** *This is an internal VA website that is not available to the public.*

b. BT Policy Procedure guide at: https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/55440000001046/content/554400000123177/1601B05-Beneficiary-Travel-BT-Table-of-Contents. **NOTE:** *This is an internal VA website that is not available to the public.*

c. Knowledge Management System, Beneficiary Travel Overview, available at: https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/55440000001046/content/554400000105602/VAMC-BT-Beneficiary-Travel-Overview. **NOTE:** *This is an internal VA website that is not available to the public.*

d. Member Services Fact Sheet, available at: <https://vaww.va.gov/hecbt/beneficiarytravel.asp>. **NOTE:** *This is an internal VA website that is not available to the public.*

6. RECORDS MANAGEMENT

All records regardless of format (e.g., paper, electronic, electronic systems) created by this directive shall be managed per the National Archives and Records Administration (NARA) approved records schedules found in VA Records Control Schedule 10-1. Questions regarding any aspect of records management should be addressed to the appropriate Records Manager or Records Liaison.

7. REFERENCES

a. P.L. 111-204.

- b. P.L. 115-55.
- c. 5 U.S.C. § 5702.
- d. 18 U.S.C. § 1001.
- e. 38 U.S.C. § 109, 111, 1503, 1521, 1725, 5103A, 5103(b)(1), 5104 and 5312.
- f. 38 C.F.R. § 1.900- § 1.953, § 17.38, § 17.85, § 17.102, § 17.148, § 17.1000-1008, § 70.10, §70.30, § 71.15, § 71.25, § 71.25(d), § 71.50.
- g. VA Form 10-3542, Veteran/Beneficiary Claim For Reimbursement of Travel Expenses.
- h. VHA Directive 1032, Health Benefit Appeals Processing, dated August 16, 2013.
- i. VHA Directive 1041, Appeal of VHA Clinical Decisions, dated October 24, 2016.
- j. VHA Directive 1217, VHA Central Office Operating Units, dated September 10, 2021.
- k. VHA Directive 1601D.02, Treatment of Allied Beneficiaries, dated February 5, 2018.
- l. VHA Directive 1601D.05, Civilian Health and Medical Program of the Department of Veterans Affairs, dated March 23, 2021.
- m. VHA Directive 1660.06, VA-TRICARE Network Agreements, dated June 28, 2019.
- n. CHAMPVA Operational Policy Manual, available at:
https://www.vha.cc.va.gov/system/templates/selfservice/va_ssnew/help/customer/locale/en-US/portal/55440000001036/topic/55440000006720/CHAMPVA-Operational-Policy-Manual.
- o. Current Household Income Thresholds Web site, available at:
<https://www.va.gov/HEALTHBENEFITS/apps/explorer/AnnualIncomeLimits/HealthBenefits>.
- p. The Department of Veterans Affairs, Community Care Web site, available at:
<https://www.va.gov/COMMUNITYCARE/index.asp>.

BENEFICIARY TRAVEL PROGRAM GUIDE

1. APPLYING FOR BENEFICIARY TRAVEL

a. A claimant may apply for beneficiary travel orally at a Department of Veterans Affairs (VA) medical facility's beneficiary travel office, a VA medical facility kiosk, in writing, or other designated location with staff responsible for processing travel claims but must provide VA the receipt for each expense other than for mileage.

b. A claimant must apply for payment of beneficiary travel within 30 calendar days after completing beneficiary travel that does not include special mode transportation.

c. For beneficiary travel that includes a special mode of transportation, a claimant must apply for payment of beneficiary travel and obtain approval from a VA clinician prior to travel. However, if the travel included a special mode of transportation and the claimant without prior approval applies for payment of the beneficiary travel within 30 calendar days after the travel is completed, the application will be considered timely submitted if the travel was for emergency treatment.

d. For travel that includes meals and lodging, a claimant must apply for and receive approval through the claimant's local beneficiary travel program prior to obtaining the meals and lodging in order to receive payment.

e. If a determination is made by a responsible official that additional information is needed to make a determination, the claimant will be notified in writing of the deficiency and will be requested to provide additional information. If the claimant has not responded to the request within 30 days, the Chief of the Business Office, or other designee, may decide the claim prior to the expiration of the 1-year submission period required by 38 United States Code (U.S.C.) § 5103(b)(1) based on all the information contained in the file, including any information obtained on behalf of the claimant. If the Chief of the Business Office, or other designee, does so and the claimant subsequently provides the information within 1 year of the date of the request, the Chief of the Business Office, or other designee must re-adjudicate the claim.

f. If a person becomes eligible for payment of beneficiary travel after the travel takes place, payment may be made if the person applies for travel benefits within 30 days of the date when the person became eligible for travel benefits.

g. The date of an application for beneficiary travel is the postmark date, if mailed; or the date of submission if hand delivered or provided electronically or orally at a VA medical facility's Beneficiary Travel office or other designated location with staff responsible for processing travel claims.

2. WHERE TO APPLY

Claimants for beneficiary travel must submit information to the VA medical facility Business Office, designated beneficiary travel office or other designated location with staff responsible for processing travel claims at the VA medical facility responsible for the medical care or services being provided and for which travel is required. This submission may be completed using approved electronic applications or VA Form 10-3542, Veteran/Beneficiary Claim For Reimbursement of Travel Expenses.

3. VETERANS ELIGIBLE FOR BENEFICIARY TRAVEL PAYMENTS

The following Veterans are eligible for payment of beneficiary travel payments after meeting one of these qualifiers:

a. A Veteran who travels to or from a VA medical facility or VA-authorized medical facility in connection with treatment or care for a Service-Connected (SC) disability (regardless of percent of disability).

b. A Veteran with a SC disability rated at 30% or more who travels to or from a VA medical facility or VA-authorized medical facility for examination, treatment, or care for any condition.

c. A Veteran who travels to a VA medical facility or VA-authorized medical facility for a scheduled compensation and pension (C&P) examination.

d. A Veteran receiving pension under 38 U.S.C. § 1521, who travels to or from a VA medical facility or VA-authorized medical facility for examination, treatment, or care.

e. A Veteran whose annual income (as determined under 38 U.S.C. § 1503) does not exceed the maximum annual rate of pension that the Veteran would receive under 38 U.S.C. § 1521 (as adjusted under 38 U.S.C. § 5312) if the Veteran was eligible for pension and travels to or from a VA medical facility or VA-authorized medical facility for examination, treatment, or care.

f. A Veteran traveling to obtain a service dog under 38 Code of Federal Regulations (C.F.R.) § 17.148 without regard to whether the Veteran meets the eligibility criteria as set forth in 38 C.F.R. § 70. **NOTE:** VA will provide payment for travel expenses related to obtaining a replacement service dog, even if the Veteran is receiving other benefits for the service dog that the Veteran needs to replace.

g. Veterans with vision impairment, spinal cord injury or disorder (SCI/D), or with double or multiple amputations whose travel is in connection with care provided through a special disabilities rehabilitation program of VA (including programs provided by spinal cord injury centers, blind rehabilitation centers and prosthetics rehabilitation centers) if such care is provided:

(1) On an in-patient basis; or

(2) During a period in which the VA provides the Veteran with temporary lodging at a VA medical facility to make such care more accessible to the Veteran.

4. OTHER PERSONS ELIGIBLE FOR BENEFICIARY TRAVEL

a. **Allied Beneficiaries.** For Allied Beneficiaries, as defined by 38 U.S.C. § 109, travel is subject to a reimbursement agreement by the government concerned. For information on the beneficiary travel eligibility of Allied Beneficiaries, see Veterans Health Administration (VHA) Directive 1601D.02, Treatment of Allied Beneficiaries, dated February 5, 2018.

b. **Attendants.** An attendant is an individual accompanying a beneficiary who is eligible for beneficiary travel and who is medically determined to require aid or physical assistance of another person as determined by a VA clinician.

c. **Beneficiaries of Other Federal Agencies.** Beneficiary travel for beneficiaries of other Federal agencies may be authorized for travel incident to medical services rendered upon requests of those agencies, subject to a reimbursement agreement by those agencies.

d. **Other Persons.** A member of a Veteran's immediate family, a Veteran's legal guardian, or a person in whose household the Veteran certifies an intention to live, if such person is traveling for consultation, professional counseling, training, or mental health services concerning a Veteran who is receiving care for a SC disability; or a member of a Veteran's immediate family, if the person is traveling for bereavement counseling relating to the death of the Veteran in the active military, naval, or air service in the line of duty and under circumstances not due to the Veteran's own misconduct.

e. **Persons eligible as caregivers.** Persons approved and designated under 38 C.F.R. part 71 as primary or secondary family caregivers are eligible for beneficiary travel.

f. During approved instruction, education and training to provide personal care services for an eligible Veteran, as defined in 38 C.F.R. § 71.15, regardless of whether the eligible Veteran is eligible for beneficiary travel under Appendix A paragraphs 3.a through 3.g.

g. While accompanying the eligible Veteran (as defined in 38 C.F.R. § 71.15) during the period of time in which the eligible Veteran is traveling to or from a VA medical facility, a VA-authorized medical facility, or other place for examination, treatment, or care and for the duration of the medical examination, treatment, or episode of care, only if the eligible Veteran as defined in 38 C.F.R. § 71.15 is eligible for beneficiary travel under Appendix A paragraphs 3.a through 3.g.

h. While traveling for consultation, professional counseling, marriage and family counseling, training, or mental health services under 38 C.F.R. § 71.50 as are

necessary in connection with the treatment of an eligible Veteran (as defined in 38 C.F.R. § 71.15) who is receiving care for a service-connected disability.

5. BENEFICIARY TRAVEL EXPENSES THAT ARE PAID

a. **Beneficiary Reimbursable Expenses and Amounts.** Eligible Veterans and beneficiaries may obtain beneficiary travel reimbursement for the following expenses:

(1) The per mile rate established by VA for the period of travel for use of privately-owned vehicle or the actual cost for use of the most economical common carrier (bus, train, taxi, airplane, etc.), for travel to and from VA medical facility or VA authorized medical facility subject to the following:

(a) An allowance for travel based on mileage may exceed the cost of such travel by common carrier regardless of medical necessity.

(b) Payment for a common carrier may not exceed the amount allowed for a privately-owned vehicle unless travel by a privately-owned vehicle is not reasonably accessible as determined by Chief Business Officer or designee or travel by a common carrier is determined to be medically necessary by a VA clinician.

(2) The actual cost of ferry fares, bridge tolls, road tolls and tunnel tolls.

(3) The actual cost of a special mode of transportation. **NOTE:** *The Chief, Business Office or designee must:*

(a) *Verify beneficiaries attended medical appointments prior to approving payment of Special Mode of Transportation vendor invoices.*

(b) *Implement periodic reviews verifying beneficiaries listed on vendor invoices have been properly authorized for Special Mode of Transportation services or attended medical appointments prior to approving payment of Special Mode of Transportation vendor invoices.*

(c) *Implement controls to prevent beneficiaries using Special Mode of Transportation services from also obtaining mileage reimbursement for the same appointment(s).*

(4) The actual cost for meals, lodging, or both, not to exceed 50 percent of the amount allowed for government employees, when VA (this can be made either by the Chief Business Officer, designee or based on a VA clinician determination) determines that an overnight stay is required. Factors VA may consider in making that determination include, but are not limited to the following:

(a) The distance the Veteran must travel.

(b) The time of day when VA scheduled the Veteran's appointment.

(c) The weather conditions or congestion conditions affecting the travel.

(d) The Veteran's medical condition and its impact on the ability to travel.

b. Attendant Reimbursable Expenses and Amounts

(1) For shared travel in a privately-owned vehicle, payments are limited to the amount for one beneficiary. For example, if a beneficiary and an attendant travel in the same automobile or if two beneficiaries travel in the same automobile, the amount for mileage will be limited to the amount for one beneficiary.

(2) The actual cost for meals, lodging, or both, may be paid when VA determines that an overnight stay is required. Factors VA decision-makers (e.g. as appropriate, decision-makers are determined by their local beneficiary travel Program) may consider in making that determination are the same as those for the Veteran noted in Appendix A, paragraph 5.a.(4).

c. Payment Considerations

(1) VA provides a one-time daily payment, either one-way or roundtrip as specified by this directive, to provide reimbursement of travel expenses of a beneficiary from their residence and traveling for the purposes of VA health care or services.

(2) Payment is limited to travel from a beneficiary's residence to the nearest VA medical facility where the care or services are provided and from such VA medical facility to the beneficiary's residence.

(3) Payment may be made for travel from a beneficiary's residence to the nearest non-VA facility where the care or services are provided and from such facility to the beneficiary's residence if a VA clinician determines that it is necessary to obtain the care or services at a non-VA facility.

(4) If a beneficiary's residence changed while receiving care or services, payment for the return trip will be for travel to the new residence, except that payment may not exceed the amount that would be allowed from the facility where the care or services could have been provided that is nearest to the new residence. **NOTE:** *For example, if during a period of care or services in Baltimore, a beneficiary changes his or her address from Baltimore to Detroit, payment for the return trip would be limited to that allowed for traveling to the new residence from the nearest facility to the new residence in Detroit where the care or services could have been provided.*

(5) Payment may be made for travel from or to a place where the beneficiary is staying (if the beneficiary is not staying at the beneficiary's residence) but the payment may not exceed the amount that would be payable for travel under preceding paragraph 5.c.(1) or paragraph 5.c.(2), as applicable.

(6) If the beneficiary is in a terminal condition in a VA medical facility or other facility under VA auspices, payment may be made for travel to their residence or a VA medical facility or non-VA medical facility that is nearer to the beneficiary's residence. Payment may be made for travel to the medical facility receiving the beneficiary for that purpose.

(7) On a case-by-case basis, payment for travel may be paid for any distance if it is financially favorable to the government. For example, payment for travel could be allowed to a more distant nursing home when admission to that nursing home is a prerequisite to qualify for community assistance that would more than offset the additional travel payment.

(8) On a case-by-case basis, payment for travel may be paid in excess of one payment per day guideline found in paragraph (1) of this section if additional travel is indicated for purposes of VA care or services (e.g. claimant is referred to another VA-authorized medical facility occurring during the same day for additional treatment).

(9) Beneficiary travel will not be paid under the following circumstances:

(a) The payment of travel would be counterproductive to the therapy being provided and such determination is recorded in the patient's medical records and the VA medical facility Chief of the Staff reviewed and approved the determination by signature in the patient's medical record.

(b) Return travel for a beneficiary receiving an irregular discharge.

(c) For emergency transportation of Veterans for non-SC conditions in non-VA facilities when the payment for transportation is covered by 38 C.F.R. § 17.1000 through § 17.1008 as authorized by 38 U.S.C. § 1725.

6. DEDUCTIBLE PAYMENT REQUIREMENTS AND EXCEPTIONS

a. **Beneficiary Travel Deductible Amounts.** The deductible for beneficiary travel is \$3.00 per one-way trip (\$6.00 for a round-trip).

(1) The deductible requirement is subject to a monthly maximum amount of \$18.00 or six one-way (three round) trips whichever occurs first.

(2) Upon reaching \$18.00 in deductibles or six one-way (three round) trips whichever occurs first, travel payments made for the balance of that particular month will be free of deductible charges.

b. **Exceptions to the Beneficiary Travel Deductible.** The deductible does not apply when:

(1) Travel is by way of special mode of transportation.

(2) Travel is to a VA facility for a scheduled C&P examination.

(3) Travel is by a non-Veteran.

(4) Travel is by an attendant.

(5) Travel is by a donor.

(6) The deductible would cause a severe financial hardship as described in paragraph 6c of Appendix A.

c. **Waiver of the Beneficiary Travel Deductible.** The deductible requirement must be waived when it would cause the Veteran severe financial hardship. Severe financial hardship is considered if the Veteran:

(1) Is in receipt of a VA pension; or

(2) Has an income for the year immediately preceding the application for beneficiary travel that does not exceed the VA national means test household income threshold; or

(3) Is able to demonstrate that due to circumstances such as loss of employment, or incurrence of a disability, their income in the year of travel will not exceed the VA national means test household income threshold for that year. **NOTE:** *A Veteran whose income (as determined under 38 U.S.C. § 1503) does not exceed the maximum annual rate of pension that the Veteran would receive under 38 U.S.C. § 1521 (as adjusted under 38 U.S.C. § 5312) if the Veteran were eligible for pension during that year is eligible for a waiver because the maximum annual rate of pension is below the VA national means test household threshold. The current household income thresholds can be found at the internet website address:*

<https://www.va.gov/HEALTHBENEFITS/apps/explorer/AnnualIncomeLimits/HealthBenefits>.

d. **Waiver Period.** A Veteran granted a waiver must promptly inform VA Chief of Business office, or designee, of any household income status change during the waiver period that results in the Veteran no longer meeting the requirements outlined under subparagraph Appendix A, Paragraph 6.c. Waivers are valid:

(1) Through the end of the calendar year in which the application was made; or

(2) Until there is a change in the beneficiary's household income during the calendar year in which the application was made that results in the beneficiary no longer meeting the requirement outlined under paragraph Appendix A, Paragraph 6.c.

7. PAYMENT OF BENEFICIARY TRAVEL

a. **When Payments are Made.** Payments are made on a reimbursement basis after the travel has occurred, with the following exceptions:

(1) Upon completion of examination, treatment, or care, payment may be made before the return travel has occurred.

(2) In the case of travel by special mode of transportation, VA Chief of Business office, or designee, may provide payment for beneficiary travel to the provider of transportation before determining eligibility of such person for such payment if VA determines the travel is for emergency treatment and the beneficiary or other person made a claim that the beneficiary is eligible for payment for the travel.

b. **Recipients of Payments.** Payment is usually made to the beneficiary. However, the beneficiary travel payment may be made directly to the person or organization that paid for or provided the travel when satisfactory evidence is presented such as verifiable paid invoices, credit card statements, etc.

8. CRITERIA FOR APPROVAL

a. Payment for beneficiary travel will be approved if:

(1) The travel was made to obtain care or services for a person who is eligible for beneficiary travel under Appendix A, paragraph 3 and 4.

(2) The travel was in connection with care for which such person was eligible.

(3) Application was made in accordance with Appendix A, paragraph 1.

(4) Any failure to obtain the care or services was due to actions by officials of VA or persons acting on behalf of VA.

b. When a claimant requests payment for beneficiary travel after the provision of care or services and the travel did not include a special mode of transportation, VA Chief Business Office, or designee will approve round-trip payment only if the travel was:

(1) In connection with care or services that were scheduled with VHA prior to arrival at the VA medical facility or

(2) For emergency treatment.

c. When a claimant requests payment for beneficiary travel for care or services that were not scheduled with VHA prior to arrival at the VA medical facility and not emergency treatment and the travel did not include a special mode of transportation, VA will not approve round-trip payment but will approve payment for the return trip if VHA provided care or services.

d. Except as provided under Appendix A, paragraph 12, when payment for beneficiary travel is requested for travel that includes a special mode of transportation, VA will approve payment if:

(1) The travel is medically required.

(2) The beneficiary is unable to defray the cost of such transportation.

(3) A VA clinician approved the travel prior to travel in the special mode of transportation or the travel was undertaken in connection with a medical emergency.

NOTE: A VA clinician can make the determination based on their scope of practice within their clinical setting (e.g., Medical - MD, NP, PA; Mental Health - Psychologist and social workers).

9. FALSE STATEMENTS BY BENEFICIARIES TO OBTAIN PAYMENT FOR TRAVEL EXPENSES

a. Persons who make false statements for the purpose of obtaining payment for travel expenses when making claims for travel are subject to prosecution under applicable laws including 18 U.S.C. § 1001.

b. VA Chief, Business Office, or designee must take appropriate action to recapture any fraudulent payments under applicable law and VA regulations.

10. APPEALING THE DENIAL OF A BENEFICIARY TRAVEL CLAIM

When a beneficiary travel claim is denied, the claimant and accredited representative must be provided written notice of the decision. Staff are provided specific procedures on developing appeals in accordance with the Veterans Appeals Modernization and Implementation Act of 2017.

11. OTHER CONSIDERATIONS

a. Travel for Research Purposes

(1) Consistent with 38 C.F.R. § 17.85(b) and § 17.102(g), when a research subject is injured while participating in a VA Research and Development Committee-approved research protocol and the VA medical facility where the injury occurred is not capable of providing the required hospital care or medical services for the research-related injuries, transportation may be authorized to transport the research subject to a non-VA medical facility. Such transportation expenses will be charged to the Research appropriation.

(2) The research site (VA medical facility) where the research subject was enrolled and at which the injury occurred, is responsible for travel expenses related to the injury. **NOTE:** *If it is necessary to transfer a research subject to another VA medical facility because the research facility cannot provide the required care, travel expenses (in both directions) will be paid from research funds at the facility where the subject was enrolled.*

(3) Research participants are not eligible for beneficiary travel transportation solely as it relates to the research project. Such travel may be reimbursed from the research project funds, if appropriate.

12. FOREIGN TRAVEL

a. Travel performed in foreign countries for the purpose of examination or treatment in a foreign country at VA expense can only be authorized by the VHA Foreign Medical Program (FMP) or Civilian Health and Medical Program of the Department of Veterans Affairs (CHAMPVA). Both programs are administered by staff of the VHA Office of Community Care, located in Denver, CO. For more information on these programs, see the Office of Community Care website, available at:

<https://www.va.gov/COMMUNITYCARE/index.asp>. Information about CHAMPVA can

be found in VHA Directive 1601D.05, Civilian Health and Medical Program of the Department of Veterans Affairs, dated March 23, 2021 along with the CHAMPVA Operational Policy Manual, available at:

https://www.vha.cc.va.gov/system/templates/selfservice/va_ssnew/help/customer/locale/en-US/portal/55440000001036/topic/55440000006720/CHAMPVA-Operational-Policy-Manual.

(1) No travel payment is authorized when a Veteran residing in a foreign country travels to the U.S. for authorized examination or treatment at VA expense. **NOTE:** *Exceptions are made when a portion of the trip is performed within the borders of the U.S.*

(2) Travel in the Philippines is not a VA covered health care benefit. Health care benefits are limited as provided by VHA Directive 1521, Outpatient Health Care for United States Veterans Residing in or Visiting the Philippines at the Department of Veterans Affairs (VA) Clinic in Manila, dated February 2, 2018.

13. TRANSPLANTS

a. Beneficiary Travel funding directly supports transplant care and treatment of the Veteran. Support functions include funding Veteran travel, meals, lodging, support person and donor expenses. VHA Directive 2012-018, Solid Organ and Bone Marrow Transplantation, dated July 9, 2012, is applicable to persons traveling to Under Secretary of Health approved VA Transplant Centers for care associated with transplant. Paragraph 4 b., designates specific persons eligible for travel assistance (the Veteran, donor and a support person or an attendant, as applicable) and travel responsibility for the referring VA medical facility and VA Transplant Centers. For additional details, see VHA Procedure Guide for Transplant Beneficiary Travel dated February 2, 2018, available at:

http://vaww.dushom.va.gov/DUSHOM/surgery/transplant/docs/Transplant_Travel_Procedure_Guide.pdf. **NOTE:** *This is an internal VA website that is not available to the public.*

b. Veterans who elect to obtain transplant care in the community must be Beneficiary Travel eligible as defined in 38 C.F.R. § 70.10 to receive funding. If eligible, the referring VA medical facility is responsible for assistance or reimbursement of travel to the non-VA transplant location and reimbursement of lodging and meals for the Veteran and attendant if ordered and as prescribed within 38 C.F.R. § 70.30. Eligibility for these Veterans should be determined using the overall Beneficiary Care eligibility requirements as outlined in this directive.

14. TRAVEL FOR ACTIVE DUTY BENEFICIARIES

Reimbursement for travel of Department of Defense (DOD) beneficiaries, both Active Duty and TRICARE, is the responsibility of DOD. VA only provides transportation to these individuals when there is an agreement that DOD will reimburse VA for such travel as stated in VHA Directive 1660.06, VA-TRICARE Network Agreements, dated June 28, 2019.

15. SPECIAL MODE OF TRANSPORTATION

A special mode of transportation can be utilized for beneficiary transportation when:

- a. A beneficiary is eligible for beneficiary travel as outlined in Appendix A, paragraphs 3 and 4 of this directive.
- b. A VHA health care clinician, acting within their scope of practice, determines that this mode of transport is clinically required.

16. TRAVEL AUTHORIZATION

Beneficiary travel is authorized in advance in one of the following ways:

- a. The beneficiary is scheduled for an outpatient visit and presents for and is seen for the scheduled appointment.
- b. The beneficiary is scheduled for admission and is admitted to the VA medical facility.

17. RECOVERY OF PAYMENT

Payment for beneficiary travel made to persons ineligible for such payment are subject to recapture under applicable law, including the provisions of 38 C.F.R. §§ 1.900 through 1.953.

18. REIMBURSEMENT OR PRIOR PAYMENT

a. Payment will be made on a reimbursement basis after the travel has occurred, except that:

(1) Upon completion of examination, treatment, or care, payment may be made before the return travel has occurred and

(2) In the case of travel by a person to or from a VA medical facility by special mode of transportation, VA Chief Business officer, or designee, may provide payment for beneficiary travel to the provider of the transportation before determining eligibility of such person for such payment if a VA clinician determines that the travel is for emergency treatment and the beneficiary or other person made a claim that the beneficiary is eligible for payment for the travel.

b. Payment will be made to the beneficiary, except that VA may make a beneficiary travel payment to a person or organization other than the beneficiary upon satisfactory evidence that the person or organization provided or paid for the travel.