



# Elimination of Annual Means Test (Financial Assessment)

## Description

Beginning in March 2014, most Veterans will no longer be required to complete the annual financial assessment known as a Means Test. Instead, VA will receive income information from the Internal Revenue Service (IRS) and Social Security Administration (SSA), and will contact the Veterans only if the information received indicates a change in their VA health benefits may be appropriate; however, Veterans who are eligible for enrollment only because their income is below an established threshold will be required to complete a means test when applying for VA health care enrollment.

## What is Changing

VA continues to look for ways to improve the effectiveness and efficiency of its exceptional health care service and reduce the burden on Veterans. Beginning in March 2014, most Veterans will no longer be required to complete the annual financial assessment known as a Means Test.

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 receive income information from the IRS and SSA, and will contact the Veteran only when the information received indicates a change in VA health benefits may be appropriate. Consistent with VA's current income verification processes, no changes to the Veteran's health benefits will occur unless the review process confirms the Veteran's income exceeds applicable thresholds.

Veterans applying for enrollment for the first time are still required to submit income information.

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.