



Elimination of Annual Means Test (Financial Assessment)

Frequently Asked Questions

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).

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.

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

VA will notify affected Veterans by mail of the elimination of the Means Test. 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/enroll, 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, no changes to the Veteran's health benefits will occur unless the review process confirms the Veteran's income exceeds applicable thresholds.

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). For more information, visit www.va.gov/healthbenefits.