



# Veterans Affairs Beneficiary Travel Program: Questions and Answers

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## Summary

The Department of Veterans Affairs administers a Travel Beneficiary Program to help alleviate the costs of travel to medical appointments for eligible veterans. Travel benefit eligibility for veterans is based on either the characteristics of the veteran, the type of medical appointment, or a combination of the two. Certain people who are not veterans, including family members or others accompanying veterans to appointments and organ donors, are also eligible for the benefit. Travel costs are reimbursed to beneficiaries, usually after a deductible. Costs covered by the program include a per-mile rate for travel in private vehicles, “special mode” (e.g., ambulance) travel in certain circumstances, and in some cases airfare and meals and lodging.

This report offers an overview of the benefit and includes a question-and-answer section with basic information about eligibility, the types of travel covered and how benefits are calculated, and how to apply for the benefit. The report also includes an appendix containing a review of major legislative and regulatory changes to the benefit since its inception in 1940 (P.L. 76-432) through the most recent changes enacted in 2010 (P.L. 111-163). Recent changes are primarily related to mileage reimbursement rates and deductibles. Another appendix details funding for the program between FY2006 and FY2011. Spending for the program has increased by 285% between FY2006 and FY2010, and the number of veterans claiming travel reimbursement has increased by 30% during that time.

## Contents

Overview .....	1
Questions and Answers .....	2
Who Is Eligible? .....	2
Eligibility Based on Veteran Characteristics .....	2
Eligibility Based on Type of Appointment .....	3
Eligibility Based on Characteristics and Appointment Type .....	3
Non-veteran Eligibility.....	3
Which Travel Costs Are Covered?.....	4
Travel by Car .....	4
Special Mode Transportation.....	4
Airfare .....	5
Meals and Lodging .....	5
Other Costs Covered .....	5
How Are Benefits Calculated?.....	5
Deductibles .....	5
Mileage Reimbursement Rates .....	5
How Can Veterans Apply to Receive Benefits?.....	6
Are There Other Options for Travel Assistance? .....	6
Are Any Groups Excepted from the Eligibility Criteria? .....	6
Can Veterans Be Reimbursed for Relocation Travel to Another Geographic Area?.....	7
Are There Circumstances Under Which Eligible Veterans' Benefits Are Not Paid? .....	7
Can Veterans Appeal a Travel Claim Denial?.....	7

## Tables

Table B-1. Spending for the Beneficiary Travel Program, FY2006-FY2011 .....	9
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## Appendixes

Appendix A. Beneficiary Travel Program Legislative and Regulatory History .....	8
Appendix B. Beneficiary Travel Program Funding .....	9

## Contacts

Author Contact Information .....	9
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## Overview

The Department of Veterans Affairs (VA) provides a range of benefits to veterans who meet specific eligibility rules. Benefits are provided through the Veterans Health Administration (VHA), the Veterans Benefits Administration (VBA), and the National Cemetery Administration (NCA). The focus of this report is travel benefits offered through VHA to assist veterans in accessing health care by providing reimbursements for some travel costs.

In most cases, veterans must enroll to receive health benefits through VHA. All enrolled veterans are offered a standard medical benefits package<sup>1</sup>; additional health benefits may be available to veterans based on their veteran status,<sup>2</sup> the presence of service-connected disabilities<sup>3</sup> or exposures,<sup>4</sup> income,<sup>5</sup> and other factors, such as status as a former prisoner of war or receipt of a Purple Heart.

In order to improve access to VA health care services, and because veterans may need to travel significant distances to reach VA medical centers or clinics, Congress authorized VA to reimburse some veterans for travel expenses related to medical appointments as part of the medical benefits package<sup>6</sup> with the passage of P.L. 76-432 in 1940. Since its authorization, the Veterans Beneficiary Travel Program has undergone a number of significant legislative and regulatory changes affecting eligibility and the type of transportation covered, as well as the cost to VA for the benefit. Congress has changed mileage reimbursement rates and veteran deductible costs for this program.<sup>7</sup> The most recent changes to the program were made by the Caregivers and Veterans Omnibus Health Services Act of 2010 (P.L. 111-163). **Appendix A** provides a summary of legislative and regulatory changes to the program. Benefit changes have affected actual and projected program costs; details on program funding are included in **Appendix B**.

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<sup>1</sup> A detailed listing of VHA's standard medical benefits package is available at 38 C.F.R. § 17.38 (2010). For more details on eligibility for VA health care and enrollment, see CRS Report R41343, *Veterans Medical Care: FY2011 Appropriations*, by Sidath Viranga Panangala.

<sup>2</sup> Veteran's status is established by active-duty status in the U.S. Armed Forces and an honorable discharge or release from active military service. Generally, persons enlisting in one of the armed forces after September 7, 1980, and officers commissioned after October 16, 1981, must have completed two years of active duty or the full period of their initial service obligation to be eligible for VA health care benefits. Service members discharged at any time because of service-connected disabilities are not held to this requirement.

<sup>3</sup> A service-connected disability is a disability that was incurred or aggravated in the line of duty in the U.S. Armed Forces (38 U.S.C. § 101 (16)). VA determines whether veterans have service-connected disabilities and, for those with such disabilities, assigns ratings from 0% to 100% based on the severity of the disability. Percentages are assigned in increments of 10% (38 C.F.R. §§ 4.1-4.31).

<sup>4</sup> For example, veterans who may have been exposed to Agent Orange during the Vietnam War or veterans who may have diseases potentially related to service in the Gulf War may be eligible to receive care.

<sup>5</sup> Veterans with no service-connected conditions and who are Medicaid eligible, or who have an income below a certain VA means-test threshold and below a median income threshold for the geographic area in which they live, are also eligible to enroll in the VA health care system.

<sup>6</sup> 38 U.S.C. § 111; 38 C.F.R. Part 70; 38 C.F.R. § 17.38(xii).

<sup>7</sup> In recent years, some veterans' advocates have maintained that mileage reimbursements have not kept up with fluctuating gasoline prices, and stated that "travel reimbursements need to be sufficient to encourage disabled veterans to get the care they need and not delay treatment because of travel expenses." Veterans Benefits Disability Commission, *Honoring the Call to Duty: Veterans' Disability Benefits in the 21<sup>st</sup> Century*, Washington, DC, October 3, 2007, p. 247.

## Questions and Answers

Not all veterans are eligible for travel benefits, and not all travel costs are covered by the Veterans Beneficiary Travel Program. VA determines eligibility for Veterans Beneficiary Travel Program benefits based on the characteristics of the veteran, the type of medical appointment, or a combination of the two. Travel benefits are also provided for a limited group of non-veterans. Although the benefits are standardized nationally, specific mileage calculations and reimbursements are made individually at VA's 153 hospitals (medical centers) around the country through their business or travel offices. Time limits also apply for requesting reimbursement.

### Eligibility for Travel Benefits

Eligibility based on veteran characteristics:

- Veterans rated 30% or more service disabled.
- Veterans receiving VA pensions or with annual incomes below the maximum annual rate for VA pensions, for travel related to all conditions.<sup>8</sup>

Eligibility based on type of medical appointment:

- All veterans traveling for Compensation and Pension (C&P) exams.<sup>9</sup>
- All veterans traveling to a transplant center for transplant care.

Eligibility based on veteran characteristics and type of medical appointment:

- Veterans rated less than 30% service disabled for travel related to their service-connected disability.

Non-veterans eligible for benefits:

- Family members, caregivers, or attendants<sup>10</sup> traveling with veterans in some circumstances.
- Organ donors.
- Allied beneficiaries.<sup>11</sup>

## Who Is Eligible?

### Eligibility Based on Veteran Characteristics

Veterans can receive travel reimbursement if they meet certain criteria, generally related to service connection and income levels.<sup>12</sup>

<sup>8</sup> For details on VA pensions, see CRS Report RS22804, *Veterans' Benefits: Pension Benefit Programs*, by Christine Scott and Carol D. Davis.

<sup>9</sup> Veterans undergo C&P exams to determine their level of service-connected disability.

<sup>10</sup> "Attendant" means an individual traveling with a beneficiary who is eligible for beneficiary travel and requires the aid and/or physical assistance of another person (38 C.F.R. § 70.2).

<sup>11</sup> Allied Beneficiaries are certain beneficiaries of foreign countries who are eligible for treatment within the VA Health Care System. See VHA Handbook 1601D.02, "Treatment of Allied and Foreign National Beneficiaries," [http://www1.va.gov/vhapublications/ViewPublication.asp?pub\\_ID=1463](http://www1.va.gov/vhapublications/ViewPublication.asp?pub_ID=1463).

### ***Service Connection Eligibility***

“Service connection” refers to disabilities that veterans have incurred or aggravated in the line of duty in the active military, naval, or air service.<sup>13</sup> Travel reimbursement is provided for

- veterans rated 30% or more service-connected for travel relating to any condition.

### ***Income and Pension Eligibility:***

Veterans who receive pensions or who would qualify to receive a pension based on income are also eligible for travel reimbursement.

- Veterans receiving VA pension benefits can receive travel benefits for appointments related to all conditions.
- Veterans who do not qualify for pensions (e.g., those who did not serve during a period of war), but with annual incomes below the maximum annual rate for VA pensions, can receive benefits for travel related to all conditions.
- Veterans who can present clear evidence that they are unable to defray the cost of travel can receive benefits for travel related to all conditions.

### **Eligibility Based on Type of Appointment**

For two categories of appointment, travel costs are covered for all veterans, without regard to income or service-connected disability status.

- All veterans who travel for Compensation and Pension (C&P) exams have all travel costs covered and do not pay a deductible for the travel.
- All veterans traveling to a transplant center for transplant care have travel costs covered.

### **Eligibility Based on Characteristics and Appointment Type**

Veterans who are rated less than 30% service-connected are eligible for travel reimbursement for appointments that are related to their service-connected condition.

### **Non-veteran Eligibility**

A limited group of non-veterans is also eligible for reimbursement of some travel costs related to medical appointments at VA facilities:

- an attendant of a veteran, if a VA provider determines the attendant is required;

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(...continued)

<sup>12</sup> 38 C.F.R. § 70.10.

<sup>13</sup> 38 U.S.C. § 101.

- donors or potential donors of tissue, organs, or parts to a veteran receiving VA-authorized care;
- veterans' immediate family members traveling for bereavement counseling related to the death of the veteran in the active line of duty;
- veterans' immediate family members, guardians, or those in whose home a veteran lives if traveling for consultation, counseling, training, or mental health services relating to a veteran receiving care for a service-connected disability;
- allied beneficiaries, if the travel and reimbursement have been authorized by the appropriate foreign government agency; and
- beneficiaries of other federal agencies, when authorized by that agency.

## **Which Travel Costs Are Covered?**

Travel benefits are provided only for care that is being paid for by VA, and only for care that has been previously scheduled, unless it is emergency care.

In general, for those eligible to receive benefits through the program as described above, VA will provide a per-mile payment for travel by car, reimbursement for "special mode" transportation when justified, and in some circumstances reimbursement for air travel. Veterans must submit requests for reimbursement within 30 days of the travel, although certain cost reimbursements must be requested before the travel takes place. Deductibles apply in most cases.

## **Travel by Car**

Eligible veterans who drive in private cars to appointments are reimbursed at a per-mile rate for travel both to the appointment and back home. If two or more eligible beneficiaries are riding in the same car, only one mileage reimbursement will be made (i.e., the reimbursement is provided for costs actually incurred, not per person traveling).

## **Special Mode Transportation**

"Special mode" transportation refers to travel in an ambulance, wheelchair van, or other vehicle specially designed for transporting people with disabilities. Other types of transportation, such as subways, trains, airplanes, and privately owned vehicles, are not considered special mode even if they have been adapted or are capable of transporting people with disabilities. To receive benefits for special mode transportation, the veteran must be eligible for the benefit, as described above, and the special mode transportation must be medically required, as determined by a VA clinician. Reimbursement for special mode transportation must be requested prior to the trip, except in the case of medical emergencies.

- Special mode transportation from a VA facility to a community emergency facility and back is authorized for reimbursement if the transportation is required because the VA facility could not provide the needed care.
- Special mode transportation to an emergency facility for treatment can be retroactively authorized if the emergency episode of care is approved for VA payment.

## **Airfare**

The Caregivers and Veterans Omnibus Health Services Act of 2010<sup>14</sup> clarified that “actual necessary expense of travel includes the reasonable costs of airfare if travel by air is the only practical way to reach a Department facility.” The veteran’s medical condition and any other impediments to the use of ground transportation should be considered in the evaluation of whether travel by air is practical.

## **Meals and Lodging**

VA will reimburse for actual cost up to 50% of the government employee rate for meals and lodging<sup>15</sup> when deemed appropriate by VA based on medical condition, distance required to travel, weather conditions, time of appointment, and other factors. Reimbursement for food and lodging should be requested in advance.

## **Other Costs Covered**

Tolls, parking fees, luggage fees, and costs for travel by taxi or other hired vehicle may be reimbursed if receipts are offered.<sup>16</sup>

## **How Are Benefits Calculated?**

Travel benefits are distributed as reimbursements for actual costs incurred (with the exception noted above for meals and lodging capped at 50% of government employee rates), and a deductible applies in most cases.

## **Deductibles**

Deductible rates have varied in recent years (see **Appendix A**). Current deductible rates are \$3 for one-way travel and \$6 for round-trip travel, with a monthly cap of \$18 (six one-way trips or three round-trips).

Deductible waivers are available for those receiving VA pensions or qualifying based on income, and for those traveling for C&P exams.

## **Mileage Reimbursement Rates**

Mileage rates have also changed several times in recent years (see **Appendix A**). The current reimbursement rate is set at 41.5 cents per mile.

Mileage rate calculation methods vary between VA facilities. Some facilities calculate mileage based on zip codes; others use online mapping tools, such as Mapquest, to determine miles

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<sup>14</sup> P.L. 111-163.

<sup>15</sup> Government rates for meals and lodging, set by the General Services Administration (GSA), vary based on geographic location. Current rates can be found at <http://www.gsa.gov/portal/category/21287>.

<sup>16</sup> 38 C.F.R. § 70.30.

traveled. Veterans are reimbursed based on their current place of residence, whether or not it is the address to which official mail is sent. Generally travel reimbursement is paid only from the place of current residence to the nearest facility that can provide the required care.

## **How Can Veterans Apply to Receive Benefits?**

Veterans are usually able to apply for travel reimbursement at the VA medical center in which their appointment was held, through a travel office or business office within the facility. Medical centers also establish procedures to provide benefits for eligible veterans traveling to Community Based Outpatient Clinics<sup>17</sup> or other facilities under their jurisdiction.

Claimants must apply in person or in writing within 30 calendar days of completing the travel. Special mode transportation must be preapproved for reimbursement. In cases of emergency that involved special mode transportation, applications for reimbursement must be made within 30 days.

## **Are There Other Options for Travel Assistance?**

If a veteran does not qualify for travel reimbursement based on eligibility criteria, the veteran may be able to access other resources to assist in funding travel. VA facilities will provide reduced-fare request forms to veterans for submission to bus companies and other transportation providers. The transportation provider determines whether reduced fare will be offered to the veteran.

Veterans may also be able to access transportation assistance or services from non-governmental veterans service organizations, such as the Disabled American Veterans' (DAV) Transportation Network.<sup>18</sup>

## **Are Any Groups Excepted from the Eligibility Criteria?**

The only exceptions to the service-connected disability or income qualification eligibility criteria for the benefit are for those traveling for a C&P exam or those traveling to a transplant center for transplant care. Operation Enduring Freedom/Operation Iraqi Freedom/Operation New Dawn veterans, veterans with spinal cord injuries, and other "special groups" must meet standard eligibility criteria to receive the benefit.

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<sup>17</sup> Community-Based Outpatient Clinics (CBOCs) are VA health care sites that are geographically distinct or separate from its parent VA medical facility. For more information, see CRS Report R41044, *Veterans Health Administration: Community-Based Outpatient Clinics*, by Sidath Viranga Panangala.

<sup>18</sup> DAV's Transportation Network assists veterans by coordinating transportation. See <http://www.dav.org/volunteers/Ride.aspx>.

## **Can Veterans Be Reimbursed for Relocation Travel to Another Geographic Area?**

Only veterans receiving inpatient VA care and considered to be in a “terminal condition” (expected to live six months or less) are eligible to receive travel benefits to relocate to a health care facility that is not located in the area where they lived when they entered their current facility.

## **Are There Circumstances Under Which Eligible Veterans’ Benefits Are Not Paid?**

VA will not pay return travel for a beneficiary who has been irregularly discharged.<sup>19</sup> If a veteran arrives at a medical center for non-emergency services without an appointment and receives care or services, VA will approve payment only for return trip costs; if no services are provided, VA will not approve payment for travel.

## **Can Veterans Appeal a Travel Claim Denial?**

If a veteran has a travel claim denied, the veteran must be provided with written notice of the decision. Veterans have rights to appeal the decision, which can be filed with the Board of Veterans Appeals.<sup>20</sup>

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<sup>19</sup> 38 C.F.R. § 70.2. Irregular discharges may be due to refusal, neglect, or obstruction of examination or treatment; leaving without the approval of the treating clinician; or disorderly conduct. VA may also determine that the payment of the benefit would be “counterproductive” to the care or therapy provided, if this determination is recorded in the patient’s medical records and approved by the Chief of Service or designee (38 C.F.R. § 70.30). In proposed rules, VA noted, “Although VA policy is generally to provide payments for beneficiary travel consistent with statutory authority and availability of funds, there are some situations where such payments are not medically feasible.... These provisions reflect the policy of withholding payment for beneficiary travel when such payment could be detrimental to a beneficiary’s treatment” (Department of Veterans Affairs, “Beneficiary Travel Under 38 U.S.C. 111 Within the United States,” 72 *Federal Register* 40100, July 23, 2007).

<sup>20</sup> 38 C.F.R. § 70.40. Appeals can be made using VA Form 4107VHA, <http://www4.va.gov/vaforms/va/pdf/VA4107VHA.pdf>.

## Appendix A. Beneficiary Travel Program Legislative and Regulatory History

Year	Summary	Public Law Number
1940	Travel Beneficiary Program established; VA mandated to pay actual travel or allowance based on mileage for any veteran traveling to and from a VA facility or other place for examination, treatment, or care.	P.L. 76-432
1958	Benefit is changed to a discretionary authority with “may pay” language. VA is authorized to pay necessary expenses for veterans traveling for vocational rehabilitation counseling or examination, treatment, or care.	P.L. 85-857
1960	Reimbursement for ferry fares and bridge, road, and tunnel tolls is added to the benefit.	P.L. 86-590
1966	Clarification that payment may be made before completion of travel.	P.L. 89-455
1976	VA required to examine “actual cost of travel” and submit report to Congress on proposed mileage rates.	P.L. 94-581
1978	VA mileage rates adjusted to 11 cents per mile.	N/A <sup>a</sup>
1987	Final regulations published. Due to rising costs, VA curtails eligibility; deductibles set at \$11 for trips of more than 100 miles.	N/A <sup>b</sup>
1988	Most travel reimbursement benefits restored; deductible imposed for most travel at \$3 per one-way trip or \$18 per month.	P.L. 100-322
2008	Mileage rates increased from 11 cents per mile to 28.5 cents per mile; deductibles raised to \$7.77 per one-way trip or \$46.62 per month.	P.L. 110-161
2008	Funds provided to increase mileage reimbursement rate to 41.5 cents; deductibles frozen at \$7.77/ \$46.62.	P.L. 110-329
2008	Mileage rates required to conform with General Services Administration (GSA) rates; deductible rates lowered to \$3/\$18.	P.L. 110-387
2010	Mileage rates set at 41.5 cents, with authority to adjust to GSA rates one year after enactment; includes air travel reimbursement for some cases; provides travel, lodging, and per diem for family members of eligible veterans who are receiving caregiver training; directs reimbursement for travel expenses for attendants.	P.L. 111-163 <sup>c</sup>

**Source:** Table prepared by Congressional Research Service.

- a. Department of Veterans Affairs, “Increase in Mileage Reimbursement Rate and Deductible Amounts in the Beneficiary Travel Program,” *73 Federal Register* 6291, February 1, 2008.
- b. Veterans Administration, “Transportation of Claimants and Beneficiaries,” *52 Federal Register* 7575-7577, March 12, 1987.
- c. VA is required to submit a justification to Congress if mileage rate adjustments result in a decrease.

## Appendix B. Beneficiary Travel Program Funding

According to the Department of Veterans Affairs, the costs associated with the Travel Beneficiary Program have risen in recent years due to the increased number of veterans claiming mileage reimbursement, a rise in the average number of claims per veteran, and higher costs per veteran claim.<sup>21</sup> VA showed a 30% increase in the number of veterans claiming reimbursement (estimated at 450,000 in FY2008 and 586,000 in FY2009), and showed the average number of claims per veteran increased from 5.5 to 7.1 during that same period.<sup>22</sup>

As shown in **Table B-1**, spending for the Beneficiary Travel Program increased by approximately 285% between FY2006 and FY2010. It is estimated that VA will spend approximately \$798 million in FY2011. It should be noted that the funding for this program comes directly from the VA health care appropriation.<sup>23</sup>

**Table B-1. Spending for the Beneficiary Travel Program, FY2006-FY2011**

\$ in thousands

	<b>FY2006 Actual</b>	<b>FY2007 Actual</b>	<b>FY2008 Actual</b>	<b>FY2009 Actual</b>	<b>FY2010 Estimate</b>	<b>FY2011 Estimate</b>
Expenditures	\$198,762	\$228,955	\$372,964	\$628,691	\$765,848	\$798,014

**Source:** Table prepared by Congressional Research Service (CRS), based on data from the U.S. Department of Veterans Affairs, Congressional Budget Submissions (FY2008-11), *Medical Programs and Information Technology*; see <http://www4.va.gov/budget/products.asp>.

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<sup>21</sup> Department of Veterans Affairs, *Veterans Beneficiary Travel Program*, Report to Congress, December 2009.

<sup>22</sup> Each mileage reimbursement claim corresponds to one round trip.

<sup>23</sup> For a description of appropriations accounts that fund VA health care, see CRS Report R41343, *Veterans Medical Care: FY2011 Appropriations*, by Sidath Viranga Panangala.