

Streamlined Oversight – Definitions

Spouse	Individual serving as the beneficiary's VA-appointed fiduciary who was recognized as the beneficiary's spouse during the last field examination.
Friend, relative or caretaker	Individual who has direct and regular contact with the beneficiary and is the beneficiary's relative, friend, VHA-approved family caregiver or other caretaker of the beneficiary. This category may include an employee of the facility in which the beneficiary resides. The status of this person must be confirmed in the last field examination to qualify as an acceptable source of information.
VHA-approved family caregiver	Individual who is approved by VHA as a family caregiver for the beneficiary. The status of this person must be confirmed by checking the data matched information in the Beneficiary Fiduciary Field System or listed on the fiduciary website, http://vbaw.vba.va.gov/PENSIONANDFIDUCIARY/fiduciary/index.asp
Administrator of the facility in which the beneficiary resides	Individual who has direct and regular contact with the beneficiary. This is generally the administrator of the facility in which the beneficiary resides or another facility employee designated by the administrator.
State or local government licensed facility	Any facility in which the beneficiary resides that is licensed by a State or local government agency to operate a residential health care facility. This includes nursing homes, personal care homes, residential care homes, community care homes, alternate living facilities, and any other business that fits this category.
Locations monitored and supervised by the Veterans Health Administration	Any situation in which the beneficiary's living conditions and care are monitored by VHA personnel. This can include nursing homes, personal care homes, community care homes, alternate living facilities, participants in the caregiver program and medical foster homes.
Excellent Situation	A beneficiary is in an excellent situation if his or her personal environment is secure, clean and comfortable, and in good repair. The excellent situation must also include assurance that the beneficiary's financial position is stable, which means that there are no impending circumstances that would jeopardize the beneficiary's financial security. A beneficiary who is in this type of situation is being afforded all of his or her rights and has a fiduciary that has consistently met all of the responsibilities of a VA-appointed fiduciary. Specifically, the fiduciary has disbursed or otherwise managed funds according to the best interests of the beneficiary and the beneficiary's dependents and in light of the beneficiary's unique circumstances, needs, desires, beliefs, and values.
Inadequate Response	A response to a <i>Beneficiary Status Report</i> that is incomplete and for which requests for additional information are unanswered.
Inappropriate Response	Any response to a <i>Beneficiary Status Report</i> that indicates discord between the beneficiary and his or her fiduciary, possible financial malfeasance or compromised physical well-being of the beneficiary.