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## Chapter 6 BENEFICIARY TRAVEL (BT)

### 6.01 Introduction

This chapter provides the administrative procedures and guidelines on authorizing and processing reimbursement of BT for individuals participating in the Department of Veterans Affairs (VA) Vocational Rehabilitation and Employment (VR&E) Program. The term "individual" will be used in this chapter to refer to processes that apply to Veterans, Servicemembers and dependents.

NOTE: Servicemembers may receive BT under Chapter 31; however, Servicemembers attending counseling under Chapter 36 are not eligible to receive reimbursement of BT unless the individual has been determined incompetent. In this situation, educational and vocational counseling must be provided prior to the selection of a program of education or training (38 U.S.C. 3697A).

Dependents attending counseling under Chapter 35 are eligible to receive BT only when counseling is required (38 CFR 21.3105). Dependents receiving services under Chapter 18 are eligible to receive BT comparable to BT provided under Chapter 31 (38 CFR 21.8370).

Refer to M28R.VII.A for more information on other benefits case management.

### 6.02 References and Resources

Laws: 38 United States Code (U.S.C.) 111  
38 U.S.C. 3697A

Regulations: 38 Code of Federal Regulations (CFR) 21.154  
38 CFR 21.370 through 21.376  
38 CFR 21.3105  
38 CFR 21.8370

VA Forms (VAF): VAF 20-0968, Claim for Reimbursement of Travel Expenses  
VAF 28-1905d, Special Report of Training  
VAF 20-8824e, Common Security Services (CSS) User Access Request  
VAF 28-1905m, Request for and Receipt of Supplies

Websites: [http:// www.gsa.gov/perdiem](http://www.gsa.gov/perdiem)

### 6.03 General Information

Individuals who travel to and from a VR&E office or other place in connection with vocational rehabilitation may be entitled to reimbursement for the cost of BT to include lodging and meals. Reimbursement for BT may be authorized at Government expense within limits specified by law in accordance with 38 U.S.C 111 in the following situations:

- Initial Evaluation, Reevaluation and Counseling Appointments
- Intraregional travel
- Interregional travel
- Attendant travel

### 6.04 Initial Evaluation, Reevaluation and Counseling Appointments

When VR&E asks an individual to report to a designated place for an initial evaluation, a reevaluation, or a counseling appointment (including personal or vocational adjustment counseling), reimbursement of BT must be authorized to and from the place of evaluation and counseling if requested by the individual (38 CFR 21.376). During the appointment, VR&E staff should ask the individual if they wish to claim travel for the appointment and also inform the individual that requests for reimbursement of travel expenses must be received within 30 days after completion of travel.

BT is not tied to a specific case status or the amount of miles traveled. This means that anytime an individual reports to a VR&E Office for evaluation or counseling, travel expenses may be reimbursed using VAF 20-0968 (see Appendix O, VA Forms) regardless of the case status or amount of miles traveled, even if the amount is under or above 50 miles. (See section 6.08 of this chapter for more information on reimbursing travel expenses using VAF 20-0968.)

VR&E staff should note that VA does not authorize BT for scheduled case management appointments, either at a training facility or VR&E Office. VR&E must only authorize BT for an individual who comes in without a scheduled appointment, or for a scheduled case management appointment, when the case manager determines that the individual was in need of and was provided personal or vocational adjustment counseling. This determination should be documented in Corporate WINRS (CWINRS) notes.

## 6.05 Intraregional Travel

VA may authorize intraregional BT for travel to and from an individual's residence and a training or employment location when travel is within the territory of the Regional Office (RO) of jurisdiction and the individual is instructed to travel for any of the following reasons (38 CFR 21.370):

- a. The individual is reporting to the chosen school or training facility for the purpose of starting training.
- b. The individual is reporting to a prospective employer or trainer for an interview prior to starting training when there is definite assurance that the individual will be found acceptable to start training.
- c. The individual is reporting to the chosen school for a personal interview prior to induction into training.
- d. The individual is reporting to a rehabilitation facility.
- e. The individual is returning to his/her home from the training or rehabilitation facility when training is not available for a period of 30 days or more (including summer vacation periods).
- f. The individual is returning to the training or rehabilitation facility from his/her home when the purpose of the travel is to continue the rehabilitation program.
- g. The individual is returning from the training facility after his/her case is placed in discontinued or interrupted status for any reason, except abandonment of training by the individual without good reason.
- h. The individual is reporting to a place of prearranged satisfactory employment upon completion of a rehabilitation plan of services for the purpose of beginning work.
- i. The individual is returning to his/her home from the place of training following rehabilitation to the point of employability, when suitable employment is not available.
- j. The individual is reporting to a place to take a scheduled examination required to practice the trade or profession for which he/she has been trained. This travel must be limited to points within the state where the individual pursued his/her training or, if the individual returned to the state that he/she was sent to pursue training, he/she may receive travel expenses related to traveling to a place within that state to take the examination. If there is more than one place within the state that the individual could take

the examination, travel must be limited to the nearest place.

Intraregional BT requires prior approval from the individual's case manager unless the case manager determines that the individual was acting in good faith or the individual is participating in an approved retroactive induction plan of services. Requests for reimbursement of intraregional BT must be received in writing from the individual (an email from the individual meets this requirement). The case manager must ensure that the determination to authorize BT is documented in CWINRS notes.

Intraregional travel only includes travel to and from the individual's residence and a training or employment location if that location is outside routine commuting distance in the geographic area. A normal daily commute is defined as 50 miles one-way. This means that an individual traveling to and from a training or employment location within the routine commuting distance of 50 miles would not be eligible to receive BT. Additionally, an individual participating in the VR&E Program would not normally receive reimbursement for daily travel to and from a training or employment location except as authorized under 38 CFR 21.154 (refer to M28R.V.A.1 for guidance on Special Transportation Assistance).

NOTE: Authorization of intraregional BT is limited to the individual's transportation, and does not include transportation for dependents, or for moving personal effects, to include expenses for a moving truck or related services.

#### 6.06 Interregional Travel

VA may authorize interregional BT when travel from the jurisdiction of one RO to a training or employment location in the jurisdiction of another RO is needed to accomplish the goals of his/her rehabilitation plan and meets the following conditions (38 CFR 21.372):

- a. The individual is entering training in the nearest satisfactory facility.
- b. The individual is entering training in a state in which he/she has long-standing family and social ties, and in which he/she plans to live following rehabilitation.
- c. The individual is reporting to an employer-trainer when all necessary steps have been taken to establish an On-the-Job training (OJT) program.
- d. The individual is reporting to a rehabilitation facility.
- e. The individual is returning to his/her home from the training or rehabilitation facility when training is not available for a period of 30 days or more

(including summer vacation periods).

- f. The individual is returning to the place of training or rehabilitation services from his/her home when the purpose of the travel is to continue training or rehabilitation services.
- g. The individual is returning from the training facility after his/her case is placed in discontinued or interrupted status for any reason, except abandonment of training by the individual without good reason.
- h. The individual is reporting to a place of prearranged suitable employment or for a prearranged employment interview following completion of his/her training program when each of the following conditions is met:
  - There is no opportunity for suitable employment for the individual within the jurisdiction of the training facility, and
  - The individual has a serious employment handicap
- i. The individual is returning from his/her training facility upon completion a training program when satisfactory employment is not available.
- j. The individual is returning from the training facility without authorization because VR&E did not issue the necessary travel authorization in a timely manner.

Interregional BT requires prior approval from the individual's case manager unless the case manager determines that the individual was acting in good faith or the individual is participating in an approved retroactive induction plan of services. Requests for reimbursement of BT must be received in writing from the individual (an email meets this requirement). The case manager must ensure that the determination to authorize BT is documented in CWINRS notes.

NOTE: Authorization of interregional BT is limited to the individual's transportation and does not include transportation for the individual's dependents, or for moving personal effects, to include expenses for a moving truck or related services.

#### 6.07 Attendant Travel

Attendants may receive BT to enable an individual to attend appointments for initial evaluation and counseling or for intraregional and interregional travel.

##### a. Relatives Prohibited

VR&E must not pay the attendant a fee if he/she is a relative of the individual

in accordance with 38 CFR 21.374. A relative is defined in 38 CFR 21.374 as a person who by blood or marriage is considered to be any of the following:

- A spouse
- A parent
- A child
- A brother
- A sister
- An uncle
- An aunt
- A niece
- A nephew

b. Attendants not Employed by the Federal Government

VR&E may authorize persons not in regular civilian employment of the Federal Government to act as attendants when they are not considered to be a relative. BT for attendants will be authorized on the same basis as for the individual the attendant is accompanying.

c. Attendants Employed by the Federal Government

VR&E may authorize a person in the regular civilian employment of the Federal Government to act as an attendant. When assigned, the attendant will be entitled to transportation and expenses or may be allowed per diem in place of subsistence in accordance with the provisions of Federal Travel Regulations. VR&E must not pay a fee to civilian employees of the Federal Government who act as attendants.

#### 6.08 Reimbursement of Travel Expenses

When authorized, VA has authority to provide reimbursement to eligible persons for mileage driven in a private vehicle (at a rate of 41.5 cents per mile) or for transportation by common carrier/public transportation with the presentation of an itemized receipt within 30 calendar days of travel (plane, bus, taxi, etc.). Ferry fares; bridge, road and tunnel tolls; luggage fares; or parking associated with travel may also be provided on presentation of an itemized receipt within 30 calendar days of travel. However, consideration must be given to the most

economical means of transportation (i.e., reimburse the mileage rate or actual cost, whichever is less, or pay the mileage rate if no actual costs are claimed).

NOTE: Reimbursement for the cost of rental vehicles is prohibited.

a. Special Considerations

The following must be considered when determining reimbursement for BT expenses:

1. In order to receive reimbursement of BT, an individual must actually incur an expense. Should one or more individuals travel together in a private vehicle, only the owner of the vehicle is actually incurring expenses and therefore is the only person entitled to reimbursement.
2. Should multiple individuals share a vehicle where passengers must pay for their transport such as a taxi or where one individual pays another individual for transport, then all are entitled to reimbursement either at the mileage rate or actual cost, whichever is less. The individual must submit an itemized receipt within 30 days after completion of travel to receive reimbursement.
3. Individuals who take non-pay transportation such as DAV transportation, VA transportation systems (VTS) or other no-cost city, state, or area systems are only eligible to be reimbursed for any travel to and from his/her residence to point of pick-up/drop-off as they are not otherwise incurring an expense.

b. Lodging and Meals

For travel beyond 12 hours, the cost of lodging and meals may be reimbursed up to 50% of the local government employee rate upon the presentation of itemized receipts within 30 days of completion of travel. Refer to [http:// www.gsa.gov/perdiem](http://www.gsa.gov/perdiem) to find the current rates. Reimbursement for lodging and meals may be provided for conferences, supplemental short-term trainings and other required travel beyond 12 hours in connection with vocational rehabilitation with prior approval from the individual's case manager.

NOTE: Reimbursement for lodging and meals must not be provided for training that encompasses the individual's entire rehabilitation program or solely because the individual chooses to stop or take a less direct route.



## c. VA Form (VAF) 20-0968

VAF 20-0968 must be used to reimburse BT. To ease the administrative burden on VR&E staff, VAF 20-0968 may be completed by the individual requesting reimbursement for BT. A properly executed form should be enclosed with the appointment letter for individuals who live outside the local area of the VR&E office and contain a request that the individual bring the completed form to the evaluation/counseling meeting along with proof of mileage from his/her home to the office, such as a Mapquest® printout. Failure on the part of the individual to complete the form and/or provide mileage does not impact the delivery of BT benefits. VR&E staff must offer assistance and/or complete the form as needed.

VR&E staff must inform individuals that failure to request BT within 30 calendar days of travel will result in forfeiture of BT benefits. The date of an application for BT is the postmark date if mailed or the date of submission if hand delivered or requested verbally.

## d. Calculating Mileage

When reimbursing authorized BT, mileage must be calculated to and from the individual's residence and the place of evaluation and counseling or other place in connection with vocational rehabilitation (i.e., door-to-door not zip-to-zip code). The number of miles should be calculated using Mapquest® as the principal standard for determining approved reimbursement. Other standards (e.g., Rand McNally, Yahoo, Bing) may be used if data is not available in Mapquest.com®. Deviations from Mapquest® or other standard results are allowable when an identified route is impassable or documented as inappropriate.

VR&E staff that do not have access to manually enter mileage in the CWINRS Add/Edit/View Beneficiary Travel Transaction screen must complete VAF 20-8824e to request access. The Information Security Officer (ISO) at the VR&E Division processes the request for employee access in the Corporate Database Environment using the electronic Common Security Employee Manager (CSEM) application.

NOTE: CWINRS calculates mileage zip-to-zip code rather than door-to-door.

## e. Processing VAF 20-0968

To process VAF 20-0968 for an individual authorized to receive BT, VR&E staff should use the following steps:

1. Complete VAF 20-0968 or obtain completed form from the individual.

2. Ensure that the reimbursement of BT is in accordance with the guidance outlined in this chapter.
3. Ensure that the dates of travel are correct (see #6 and #9).
4. Ensure that mileage is consistent with Mapquest® or other standards (e.g., Rand McNally, Yahoo, Bing) if data is not available in Mapquest.com® (see #17a).
5. Ensure that the total amount claimed is correct (see #20).
6. Ensure that the individual's Social Security Number (SSN) is annotated for tracking purposes (see #3 and #22).
7. Ensure that the form is signed by the individual and an authorized VR&E staff member (see #15, #21 and #25).
8. Enter information in the CWINRS Add/Edit/View Beneficiary Travel Transaction screen but do not select the print VAF 3542 option. For assistance, refer to the CWINRS User Guide: Chapter 6, Case Management.
9. Submit the VAF 20-0968 along with the original itemized receipts (as applicable) to Finance to process the payment. The method used to submit forms to Finance may vary according to local policy.
10. File copies of the VAF 20-0968 and itemized receipts (as applicable) on the left side of the individual's CER folder.

NOTE: If mistakes or inappropriate charges are found on forms, VR&E staff must strike out, subtract and annotate reasons then provide due process following guidance located in M28R.III.C.2.

#### 6.09 Prepaid Travel

When VR&E authorizes prepaid travel for an individual who is not able to use personal funds to report to a place of evaluation and counseling or other place in connection with vocational rehabilitation, prepayment of transportation by common carrier and/or lodging expenses, as applicable, must be completed via the RO's Centrally Billed Account (CBA) travel card that is funded through Readjustment Benefits (RB). The CBA travel card is essentially the same as a regular purchase card but is used specifically for travel related expenses. All prepaid travel costs require prior approval from the individual's case manager and the determination to authorize prepaid travel must be documented in

CWINRS notes.

VR&E staff must contact the local Support Services Division (SSD) for assistance with the purchase of prepaid travel expenses. A memo signed by the case manager authorizing the purchase of transportation and lodging, as applicable, must be submitted to SSD when requesting prepayment of travel expenses using the CBA travel card. The memo must include traveler name (as shown on the individual's government-issued identification), date of birth (if flights are required), travel dates, location, purpose of trip, amount, date and description of purchase, and any constraints that should be considered when booking (e.g., arrive by 9am, depart no earlier than 5pm, disability-related needs, etc.).

As confirmation of flights and hotel are received by SSD, they are forwarded to VR&E, who then provides the information to the individual. VR&E staff are the liaisons between SSD and the individual during this process. Actual costs associated with prepaid travel must be recorded in CWINRS with costing charged to the RB account, Budget Object Code (BOC) 4146. Other reimbursable expenses (meals, mileage, etc.) that are not charged on the CBA travel card must be processed using VAF 20-0968 and recorded in CWINRS.

It is VR&E's responsibility to ensure that the individual traveled and incurred the travel expenses purchased with the CBA card. VAF 28-1905m (see Appendix O, VA Forms) may be used for this. Documents related to prepaid travel, such as the SSD memo and VAF 28-1905m, must be filed on the left side of the individual's Counseling/Evaluation/Rehabilitation (CER) folder. SSD will maintain records of the CBA transactions and expenses paid with the associated obligation documents in accordance with National Archives and Records Administration (NARA), General Schedule 6.