

Draft – 9.82 TRANSPORTATION SERVICES

9.82.1 Pursuant to 34 CFR 361.5 et seq –

Transportation means travel and related expenses that are necessary to enable an applicant or eligible individual to participate in a vocational rehabilitation service, including expenses for training in the use of public transportation vehicles and systems. Transportation may also include:

1. Travel and related expenses for a personal care attendant or aide if the services of that person are necessary to enable the applicant or eligible individual to travel to participate in any vocational rehabilitation service. Refer to Section **9.7 Attendant Care Services** for additional requirements.
2. The repair of vehicles but not the modification of these vehicles, as modification is considered a rehabilitation technology service. Refer to Section **9.87 Vehicle Repair Services** for additional requirements.
3. Relocation expenses incurred by an eligible individual in connection with a job placement that is a significant distance from the eligible individual's current residence. Refer to Section **9.69 Relocation and Moving Services** for additional requirements.

9.82.2 Pursuant to VR state agency et seq –

9.82.2A Provision of Transportation Services

1. Transportation services may be provided when necessary to enable an applicant or eligible individual to participate in vocational rehabilitation services or achieve an employment outcome, consistent with *34 CFR Part 361*. These services may include:
 - a. Diagnostic or evaluation services necessary for eligibility determination or IPE development;
 - b. Participation in vocational rehabilitation services identified on the IPE;
 - c. Travel and related expenses for a personal care attendant or aide when the attendant's services are necessary to enable the individual to participate in vocational rehabilitation services;
 - d. Vehicle repairs necessary to support participation in vocational rehabilitation services. Vehicle modifications are provided under Rehabilitation Technology Services;
 - e. Relocation expenses associated with an employment outcome when the job is a significant distance from the individual's current residence; and
 - f. Short-term transportation following employment placement when necessary to support the customer's transition to employment. Refer to **Section 9.82.4C(3) Placement Transportation** for additional requirements.

2. Except for transportation associated with diagnostic or evaluation services, transportation shall be included in the customer's IPE before services are provided.
3. Transportation services shall not be provided solely to alleviate poverty, satisfy routine living expenses, resolve personal financial obligations or debts, or provide financial gain to the customer.

9.82.2B Transportation Assessment

1. In assessing the customer's transportation needs, the VR Counselor shall consider:
 - a. Why transportation is necessary;
 - b. The customer's disability-related transportation needs and functional limitations;
 - c. Whether the service location is reasonable and minimizes travel distance;
 - d. Whether the service is located along the customer's established travel route;
 - e. Whether transportation creates an additional expense for the customer;
 - f. Whether transportation is appropriate for both the current VR service and the customer's employment goal;
 - g. The customer's informed choice; and
 - h. Whether feasible transportation can be established for both participation in VR services and achievement of the employment outcome.
2. If feasible transportation for participation in VR services or achievement of the employment outcome cannot be established, the VR Counselor shall consider whether continuation of the case is appropriate. The customer shall be involved in determining whether transportation is feasible and available. If continuation of the case is not appropriate, the case may be closed using the closure reason "Transportation Not Feasible or Available."

9.82.2C Transportation Planning and Sustainability

1. Transportation planning shall begin during eligibility determination and continue throughout the provision of VR services.
2. The VR Counselor shall:
 - a. Assist the customer in developing a transportation plan that supports participation in VR services and continued employment following VR case closure; and
 - b. Consider whether the selected transportation option is sustainable after VR case closure.
3. The case record shall demonstrate that available transportation options were explored and discussed with the customer before transportation services are approved or denied.

9.82.2D Cost-Effective Transportation

1. The VR Counselor shall consider transportation options in a manner that promotes cost-effectiveness while meeting the customer's disability-related needs, informed choice, and employment objectives.
2. When more than one transportation option adequately meets the customer's needs, the VR Counselor should provide the most cost effective option that adequately meets the customer's needs. However, consistent with Tennessee Rule 1240-08-04-.05(16)(a), a customer may choose to utilize their own vehicle as a transportation support service when appropriate, even if another transportation option would result in a lower cost to VR.
3. Transportation options may include:
 - a. Natural supports;
 - b. Public transportation;
 - c. Privately owned vehicle;
 - d. Ridesharing services;
 - e. Taxi services;
 - f. Vendor transportation; and
 - g. Other approved transportation options, when necessary.

9.82.2E Financial Responsibility and Comparable Benefits

1. Consistent with 34 CFR § 361.52, customers shall be supported in exercising informed choice when selecting transportation options and service providers. Refer to Section 2.0 Informed Choice for additional requirements.
2. Except for transportation associated with diagnostic or evaluation services for eligibility determination or IPE planning, and transportation provided to individuals attending TRC Smyrna, transportation services are subject to a determination of financial need.
3. VR is the payer of last resort. Before providing VR-funded transportation, the VR Counselor shall explore and utilize all available comparable services and benefits, natural supports, and existing transportation resources.
4. If a customer chooses a provider outside the service area, the customer is responsible for any additional transportation costs unless:
 - a. No qualified provider is available within the service area; or
 - b. The selected provider is closer to the customer's residence.
5. VR funds shall not be used for:
 - a. Legal fines or penalties;

- b. Court-ordered fees; or
- c. Other legally imposed sanctions or requirements.

9.82.2F Transportation Documentation

1. The VR Counselor shall discuss and document transportation needs with the customer during:
 - a. Eligibility determination;
 - b. IPE development;
 - c. 90-day contacts;
 - d. Annual reviews; and
 - e. Whenever the customer's transportation needs or circumstances change.
2. Transportation assessments, discussions, planning activities, and decisions shall be documented by completing an Actual Service Record for Counseling and Guidance.
3. An Actual Service Record for Counseling and Guidance is required when:
 - a. Transportation needs are assessed;
 - b. Transportation services are approved, modified, denied, or discontinued;
 - c. Transportation planning is completed or revised; or
 - d. Significant transportation-related discussions occur with the customer.
4. The Actual Service Record for Counseling and Guidance shall document, as applicable to the customer's circumstances:
 - a. Transportation assessment;
 - b. Transportation planning and sustainability;
 - c. Exploration of transportation options;
 - d. Cost-effective transportation considerations;
 - e. Comparable services and benefits;
 - f. Financial responsibility, including customer responsibility for transportation costs, when applicable; and
 - g. Other counseling and guidance provided during the interaction.
5. Documentation shall support the rationale for transportation decisions and demonstrate compliance with this policy.

9.82.3 Procedures

9.82.3A Transportation Assessment

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1. Prior to providing transportation services, the VR Counselor shall:
 - a. Discuss transportation needs with the customer during:
 - i. Eligibility and Needs Assessment (ENA);
 - ii. IPE development;
 - iii. 90-day contacts;
 - iv. Annual Program Reviews; and
 - v. Whenever transportation needs or circumstances change.
 - b. Discuss the customer's anticipated transportation needs following VR case closure.

9.82.3B Transportation Planning

1. Transportation planning shall focus on identifying transportation that supports participation in VR services and can reasonably be maintained following VR case closure.
2. The VR Counselor shall:
 - a. Develop a transportation plan with the customer that supports participation in VR services and continued employment following VR case closure.
 - b. Discuss
 - i. Expected transportation following employment;
 - ii. Anticipated transportation costs;
 - iii. Available community resources; and
 - iv. The customer's plan for maintaining transportation after case closure.
 - c. The VR Counselor shall review the customer's transportation needs and transportation plan during 90-day contacts, annual reviews, and whenever the customer's transportation needs, employment goal, or circumstances change. The transportation plan and associated authorizations shall be updated as necessary.
 - d. Except for transportation associated with diagnostic or evaluation services, include transportation services in the customer's IPE before services are provided.
 - e. Document the customer's anticipated primary mode of transportation in the IPE Planned Service "Description" section of the IPE (e.g., privately owned motor vehicle, public transportation, ridesharing service, or vendor transportation).

9.82.3C Transportation Decision-Making

1. The VR Counselor shall consider transportation options in a manner that promotes cost-effectiveness while meeting the customer's disability-related needs, informed choice, and employment objectives.
2. When more than one transportation option adequately meets the customer's needs, the VR Counselor should provide the most cost effective option that adequately meets the customer's needs. However, consistent with Tennessee Rule 1240-08-04-.05(16)(a), a customer may choose to

utilize their own vehicle as a transportation support service when appropriate, even if another transportation option would result in a lower cost to VR.

3. Before providing VR-funded transportation, the VR Counselor shall explore and utilize available comparable services and benefits, natural supports, and existing transportation resources. Refer to [Transportation Resource](#) for information about public transit services.
4. Transportation options should be considered in the order below. See Section 9.82.4, **Transportation Services, Fees, Authorizations, and Associated Documents**, for transportation method definitions, operational requirements, and applicable fees.
 - a. Natural supports;
 - b. Public transportation;
 - c. Privately owned vehicle;
 - d. Ridesharing services;
 - e. Taxi services;
 - f. Vendor transportation; and
 - g. Other approved transportation options, as appropriate.
5. The VR Counselor shall select the transportation option that best meets the customer's disability-related transportation needs while remaining consistent with the cost-effectiveness principles of this policy.
6. When a transportation option is selected that results in transportation costs beyond those normally paid by VR, the Actual Service Record for Counseling and Guidance shall document:
 - a. The reason the higher-cost option was determined to be the most appropriate;
 - b. The customer's informed choice, when applicable; and
 - c. When applicable, that the customer was informed of and accepted responsibility for any additional transportation costs that are not the responsibility of VR.

9.82.4 Transportation Services, Fees, Authorizations, and Associated Documents

9.82.4A Service Categories - Sub-categories

The following transportation service categories and sub-categories shall be used when authorizing transportation services.

1. Diagnostic and Evaluation Services – Diagnostic Transportation
 - a. Transportation for customers, attendants, and family members necessary to participate in diagnostic, assessment, or evaluation services.
2. Transportation – Meeting Transportation
 - a. Transportation for customers and attendants in order to attend scheduled meetings with VR staff at an agreed to site when the customer cannot afford transportation.

3. Transportation – Medical Transportation
 - a. Transportation for customers and attendants while the customer is participating in physical or mental restoration services.
4. Transportation – Training Transportation
 - a. Transportation for customers and attendants while a customer is participating in training or in employment services; may include transportation costs, when warranted, for vehicle modification training provided by a Certified Driver Rehabilitation Specialist.
5. Transportation – Placement Transportation
 - a. Transportation for customers and attendants following placement.
6. Transportation – Moving and Relocation Services
 - a. Transportation necessary for the achievement of an employment outcome.
7. Family Member Services – Family Member Transportation
 - a. Transportation for a family member who is assisting a customer to participate in VR services or employment.

9.82.4B Transportation Methods & Fees

The transportation method selected shall be appropriate to the customer's disability-related needs, employment objective, and transportation plan, consistent with **Section 9.82.2**.

1. Public Transportation
 - a. Public transportation should be utilized whenever it is available, accessible, and appropriate to meet the customer's transportation needs.
 - b. Transportation training may be provided when necessary to assist the customer in safely and independently utilizing public transportation.
 - c. Monthly or multi-trip passes should be utilized when more cost-effective than individual fares.
 - d. Payment cannot exceed:
 - i. The usual and customary fare for transportation from the customer's residence to the approved service location and from the approved service location back to the customer's residence using the selected mode of transportation.
 - ii. For private service providers, the amount approved in accordance with VR requirements. Contact the VR Regional Manager for approved rates.
 - iii. For group services not covered under a contract, grant or other agreement, the negotiated Families First (FF) rate for the service area, unless otherwise approved by the VR Regional Manager. If the local FF rate cannot be determined after contacting the Department of

Human Services (DHS) Area Manager or District Administrator, contact the VR State Office Program Manager for Policy.

2. Privately Owned Motor Vehicle

- a. A privately owned motor vehicle operated by the customer or a family member may be utilized when determined to be an appropriate transportation option.
- b. The individual operating the vehicle shall:
 - i. Possess a valid driver's license;
 - ii. Maintain current vehicle registration, when required by state law;
 - iii. Maintain motor vehicle liability insurance as required by state law; and
 - iv. Prior to authorizing reimbursement, the VR Counselor shall verify compliance with the requirements above. Verification shall be documented in the customer's Actual Service Record for Counseling and Guidance and on the Miscellaneous Personal Characteristics – Identification Numbers section of the Intake page in Aware.
- c. Mileage reimbursement shall:
 - i. Be provided only for days the customer requires travel for diagnostic or evaluation services, participation in approved VR services, or employment, when appropriate.
 - ii. Be based on verified mileage between the customer's residence and the approved service location.
 - iii. Be verified using an approved mileage calculation method, such as an online mapping service.
 - iv. Include in the Vendor Authorization **Special Instructions** the verified mileage, the verification method, and the applicable reimbursement rate.
- d. Transportation authorizations shall:
 - i. Be based on the verified monthly mileage required for the approved service or on verified mileage submitted for reimbursement.
 - ii. Be authorized in advance when the anticipated travel schedule is known, such as attendance at training, a regularly scheduled service, or a scheduled appointment. When the anticipated travel schedule is not known, transportation shall still be authorized in advance, and reimbursement shall be based on verified travel supported by appropriate documentation.
 - iii. Be adjusted whenever mileage, attendance, rates, or other relevant circumstances change.
 - iv. Not be delayed because a class schedule is unavailable at the beginning of an academic term. However, failure to provide a class schedule or other required documentation each academic term may result in VR probation and suspension of VR funding, in accordance with Section 9.61, *VR Probation and Suspension of Training Services*.

- v. Reimbursement requested by the customer or family member shall be supported by appropriate documentation.
- e. Customer-Operated Vehicle
 - i. Reimbursement shall not exceed thirty-four (34) cents per mile based on verified mileage.
 - ii. Reimbursement shall be made only to the customer.
 - iii. When more than one customer travels in the same privately owned vehicle:
 - (1) Mileage reimbursement shall be calculated as though only one customer is traveling and prorated among the customers.
 - (2) The customer operating the vehicle shall receive the reimbursement, with the passengers reimbursing the driver for their prorated share.
- f. Family Member-Operated Vehicle
 - i. When a family member provides transportation using a privately owned motor vehicle:
 - (1) The amount of compensation is based on the verified number of miles the family member must drive and cannot exceed the State comprehensive mileage rates in effect at the time of service, which can be found at [GSA Mileage Reimbursement Rates](#).
 - (2) Reimbursement shall be made only to the family member providing the transportation.
 - ii. When more than one customer is transported in the same privately owned motor vehicle operated by a family member:
 - (1) Mileage reimbursement shall be calculated as though only one customer is being transported and prorated among the customers.
 - (2) Reimbursement shall be made only to the family member providing the transportation.
- 3. Ridesharing and Taxi Services
 - a. Ridesharing or taxi services may be utilized when less costly transportation methods are unavailable or cannot adequately meet the customer's disability-related transportation needs.
 - b. Ridesharing or taxi services may include negotiated door-to-door assistance when required due to the customer's disability.
 - c. Payment shall not exceed the lowest usual and customary local rate.
 - d. Payment shall be limited to transportation necessary for participation in approved VR services or employment.
- 4. Vendor Transportation
 - a. Vendor transportation may be utilized only after less costly transportation methods have been explored and determined to be unavailable or unable to adequately meet the customer's disability-related transportation needs.
 - b. Transportation vendors shall:
 - i. Maintain all licenses, registrations, insurance, and other qualifications required by applicable federal, state, and local law; and

- ii. Comply with the terms of their agreement with VR.
- c. Individual Transportation
 - i. Be authorized only for transportation necessary to enable the customer to participate in approved VR services or achieve an employment outcome.
 - ii. Transportation shall be reimbursed at a base rate of **\$25.00 per one-way trip**, which includes transportation for trips up to twenty (20) miles.
 - iii. For trips exceeding twenty (20) miles, reimbursement will be based on the current [GSA Mileage Reimbursement Rates](#) in effect at the time of service, plus an additional **\$0.05 per mile** for each mile exceeding twenty (20) miles.
- d. Accessible Transportation
 - i. Accessible transportation may be utilized only when:
 - (1) Required due to the customer's disability;
 - (2) Less costly transportation methods have been explored;
 - (3) The customer cannot effectively utilize public transportation or another available transportation method; and
 - (4) Accessible transportation is determined to be the most appropriate transportation option.
 - ii. Reimbursement shall include:
 - (1) A base rate of **\$25.00 per one-way trip** for trips up to twenty (20) miles;
 - (2) [GSA Mileage Reimbursement Rates](#) in effect at the time of service, plus an additional **\$0.05 per mile** for each mile exceeding twenty (20) miles; and
 - (3) An additional **\$15.00 per one-way trip** when disability-related transportation assistance is required. The additional reimbursement may include:
 - (a) Wheelchair transportation;
 - (b) Lift or ramp usage; and
 - (c) Hands-on assistance required due to the customer's disability
- e. Vendor Billing
 - i. Billing shall begin when the customer is picked up.
 - ii. Billing shall end when the customer is dropped off at the approved service location.
 - iii. Pick-up fees, drop-off fees, and wait time shall not be reimbursed.
- f. Continued Use of Vendor Transportation
 - i. Continued authorization of vendor transportation beyond six (6) months requires approval by the VR Field Supervisor.
 - ii. The VR Counselor shall document the justification for continued vendor transportation in a case note titled **"Justification for Continued Vendor Transportation."**
 - iii. The approval or denial by the VR Field Supervisor shall be documented in the customer's case record.

- iv. This justification and approval process shall be completed whenever the customer's transportation needs or circumstances change and at least every six (6) months until vendor transportation is no longer authorized.

5. Air Transportation

- a. Air transportation may be utilized only when determined to be the most appropriate transportation option.
- b. Air transportation requires approval by the VR Director.
- c. The VR Area Director shall document the justification in a case note titled "**Justification for Travel by Airplane.**"
- d. The approval or denial by the VR Area Director shall be documented in the customer's case record.
- e. Payment shall not exceed:
 - i. The coach fare for public or commercial transportation, including one checked bag; or
 - ii. The negotiated rate for approved private or charter transportation.

6. Ambulance Transportation

- a. Ambulance transportation may be utilized only when medically necessary and the customer is unable, for medical reasons, to travel by privately owned vehicle or another appropriate transportation method.
- b. Comparable services and benefits shall be explored and utilized before authorizing ambulance transportation.
- c. Ambulance transportation requires approval by the VR Director.
- d. The VR Area Director shall document the justification in a case note titled "**Justification for Travel by Ambulance.**"
- e. The approval or denial by the VR Director shall be documented in the customer's case record
- f. Payment shall not exceed the applicable Medicare reimbursement rate.
- g. Refer to Section **9.5 Ambulance Services** for additional requirements.

9.82.4C Service-Specific Requirements

The following requirements apply only to the transportation service categories identified below.

1. Training Transportation

- a. Transportation may be provided when a customer temporarily resides away from the customer's primary residence to participate in approved training services.
- b. Before authorizing training transportation for postsecondary education or training, the VR Counselor shall verify that transportation is not included in the customer's tuition, fees, or

other education-related charges. The verification shall be documented in the customer's Actual Service Record for Counseling and Guidance.

- c. VR may provide transportation for up to two one-way trips during each training period (e.g., semester or quarter).
- d. Additional trips may be approved by the VR Field Supervisor when documented emergency circumstances exist.
- e. Transportation shall be authorized only for the days the customer is required to participate in approved VR services and shall not be authorized during vacations, holidays, or other scheduled breaks in service.

2. Training Transportation - TRC Smyrna

- a. Transportation for customers attending the Tennessee Rehabilitation Center (TRC) Smyrna may be provided for:
 - i. Initial transportation to TRC Smyrna;
 - ii. Return transportation to TRC Smyrna following an approved absence;
 - iii. Transportation associated with a scheduled or emergency TRC Smyrna closure;
 - iv. Transportation related to a death in the family;
 - v. Transportation for scheduled medical appointments;
 - vi. Transportation related to documented participation concerns, including homesickness, may be approved by the TRC Smyrna Case Manager. Such approval is limited to once per month unless extraordinary circumstances are documented; and
 - vii. Return transportation to the customer's residence upon completion of services.
- b. Transportation requested for personal reasons other than those identified above, including family functions, vacations, or family preference, shall be the responsibility of the customer or family.
- c. Commuting to TRC Smyrna from outside Rutherford County requires approval by the VR Field Supervisor. The VR Counselor shall document the justification in a case note titled "Justification for TRC Commuting." The justification shall describe the disability-related or hardship reasons that prevent the customer from residing on campus. The VR Field Supervisor shall document the approval or denial in the customer's case record.
- d. Transportation for customers approved to commute to TRC Smyrna shall be administered in accordance with the applicable transportation method, reimbursement requirements, and authorizations described in Section 9.82.4.

3. Placement Transportation

- a. Customers in Employed Status may receive transportation assistance until receipt of the first full paycheck.
- b. Transportation assistance may continue beyond the first full paycheck when the customer continues to meet financial need, as documented in the case record.
- c. Continued transportation assistance beyond the first full paycheck shall be reviewed by the VR Area Director at least every three (3) months. If the

VR Area Director recommends continuation, the request shall be submitted to the VR Assistant Director for final approval.

- i. The VR Area Manager shall document the recommendation in a case note titled "Justification for Continued Transportation."
- d. The approval or denial by the VR Assistant Director shall be documented in the customer's case record.
- e. Transportation assistance shall end upon case closure.

9.82.4D Authorizations

1. Transportation authorizations shall be completed using the appropriate transportation service category and sub-category.
2. Transportation authorizations shall:
 - a. Be issued only for transportation necessary to enable the customer to participate in approved VR services or achieve an employment outcome;
 - b. Be limited to the actual days transportation is required;
 - c. Not be authorized during vacations, holidays, or other scheduled breaks in service; and
 - d. Be supported by documentation maintained in the customer's case record.
3. Vendor Authorizations shall not be issued to a vendor for the purpose of disbursing transportation funds to the customer or making payments on the customer's behalf. An exception may be made for customers receiving evaluation or adjustment services through an approved Community Rehabilitation Provider. In these circumstances, Vendor Authorizations may be issued and payments made to the Community Rehabilitation Provider for disbursement to the customer.
4. Transportation authorizations may:
 - a. Be issued in advance when the dates of service and anticipated transportation needs are known; and
 - b. Be approved up to six (6) weeks in advance of the effective date to ensure timely payment.
5. Transportation authorizations shall:
 - a. Not exceed one (1) month of transportation per authorization; and
 - b. Be revised whenever transportation needs, attendance, mileage, transportation method, or other relevant circumstances change.
6. The Special Instructions section of the transportation authorization shall include, as applicable:
 - a. For transportation by privately owned motor vehicle:
 - i. The number of travel days;
 - ii. The verified mileage;
 - iii. The mileage verification method; and

- iv. The applicable reimbursement rate.
- b. For commercial transportation not authorized directly to the carrier:
 - i. The transportation carrier type; and
 - ii. The transportation carrier name.
- 7. Transportation reimbursement shall be supported by appropriate payment verification documentation, as applicable, which may include:
 - a. Receipts;
 - b. Mileage logs;
 - c. Vendor invoices;
 - d. Other documentation necessary to support transportation reimbursement.

9.82.4E Associated Documents

The following associated document is available as an Aware data page. Click the “Pages” tab and the associated document or the “New” tab to open the associated document.

Actual Service