

Revision History

Date	Version	Description	Author
2/12/2024	1.0	Initial publication	AGE
3/15/2024	1.1	Includes updates on allowable CTLP expenses including Other Direct Admin Expenses.	AGE
8/15/25	1.2	Includes updates on: • TEA Minimum spending • Other Direct Admin Maximum spending • Supplemental TEA submission process	AGE

CTLP E-Invoicing & Team Expense Account

This Business Rule is intended for Community Transition Liaison Program (CTLP) and Fiscal Department staff across the ASAP network. This Business Rule outlines allowable CTLP expenses that may be submitted to the Executive Office of Aging and Independence (AGE) for reimbursement through the E-Invoicing system.

Each ASAP has been allotted dedicated staff funding solely for CTLP based on their number of teams. Each ASAP's total number of CTLP teams has been predetermined by grouping NF by ASAP geographic location based on Department of Public Health (DPH) [public data](#) that is modified due to factors such as nursing facility (NF) business model and sub-population of residents.

Each ASAP CTLP team has been allotted a *Team Expense Account (TEA)* of up to \$12,000 per team, per fiscal year to support the community transition of skilled NF residents. Each ASAP is required to allocate a minimum of 40% of the \$12,000 TEA fund allowance within their annual budget. TEA funds may not be used to duplicate costs paid through MassHealth, Money Follows the Person Demonstration (MFP Demo), AGE Home Care, or other state-sponsored programs in which the resident is enrolled. The annual TEA funding is to be utilized in support of community transition of NF residents for items such as costs associated with CORI checks, housing applications, obtaining copies of birth certificates, obtaining state issued identification, etc.

CTLP Allowable Expenses**1. CTLP Staff Salaries:**

- Each ASAP CTLP team is composed of:
 - CTLP Supervisor (0.25 FTE per CTLP Team)
 - CTLP Liaison (1 FTE per CTLP Team)
 - CTLP Case Assistant (1 FTE per CTLP Team)
- ASAPs may only bill for salary expenses related to these CTLP team members.

- ASAPs may bill for staff members who are temporarily covering the functions of any of these 3 CTLP positions to ensure nursing facility coverage and resident assistance, utilizing the approved UFR.

AGE approved UFRs for CTLP and their allowability: Personnel Salaries

UFR Number	Program Component	Allowable Invoicing
101	CTLP Supervisor	Personnel salary
132	CTLP Liaison	Personnel salary
137	CTLP Case Assistant	Personnel salary
150	Payroll Taxes	
151	Fringe Benefits	

2. CTLP Team Expense Account (TEA):

- Up to \$12,000 per CTLP team allocated annually
 - ASAPs are required to budget a minimum of 40% of this allocation to this cost category

Number of CTLP Teams	TEA Annual Allocation (Maximum)	TEA 40% Annual Allocation (Minimum)
1	\$12,000	\$4,800
2	\$24,000	\$9,600
3	\$36,000	\$14,400
4	\$48,000	\$19,200
5	\$60,000	\$28,800

- CTLP enrolled consumers must have a consumer record in Aging & Disability (A&D) and CTLP Care Enrollment.
- An item or items may only be submitted to AGE for reimbursement through the CTLP TEA for CTLP enrolled consumers.
- TEA funding can only be used for NF resident community transitions and not for ASAP staff related expenditures.
- Alternative funding sources which support the community transition of the NF resident must be explored prior to using CTLP TEA funds.
- Purchases may not duplicate costs paid for through other programs in which the NF resident is enrolled, which may include, but not limited to:
 - MassHealth
 - State Plan Services
 - Managed Care Plans
 - Money Follows the Person Demonstration (MFP Demo)
 - AGE Home Care Programs
 - Other state-sponsored programs

AGE approved UFR for CTLP and their allowability: CTLP Team Expense Account

UFR Number	Program Component	Allowable Invoicing
216	Program Support	• Fees: CORI checks, housing application, copies of birth certificates, state issued identification, first or last month's rent, rental security deposit • Tangible items: technology (phone, laptop, tablet), household items, furniture, appliances, clothing, safety equipment, food/groceries • Services: Time-limited legal service, transportation *Other expenses not listed above, may be approved with prior approval before purchase and e-invoicing by AGE CTLP

3. Other Direct Admin Expenses:

- This category comprises all non-personnel, non-payroll tax, non-fringe benefits, and non-CTLP Team Expense Account purchases.
- ASAPs to request advance approval from the AGE CTLP Team for any costs in this category, by submitting a budget for all expected costs under this category
- Maximum allowance of 20% of the total annual budget may be allocated to cost category 510

AGE approved UFR for CTLP and their allowability: Other Direct Administrative Expenses

UFR Number	Program Component	Allowable Invoicing
510	Other Direct Administrative Expenses	ASAPs must submit the CTLP 510 Other Direct Admin Expense Details spreadsheet along with budget reflecting expected costs in this category. Allowable costs under this category include, but are not limited to: mileage, staff training, program supplies and materials, and agency administrative support.

CTLP 510 Other Direct Admin Expense Details Spreadsheet

ASAP Name:	
Program:	Community Transition Liaison Program
Document ID:	FY26CTLPROG
Period:	Fiscal Year 2026
\$ -	TOTAL 510 Other Direct Admin Expenses per approved budget
	Specify Expenditure Breakdown:
\$ -	Program Facilities (Example)
\$ -	Payroll Service (Example)
\$ -	Telephone/IT (Example)
\$ -	Printing (Example)
\$ -	

Reimbursement Procedure

CTLP Staff Salaries Reimbursement Procedure:

- ASAP Fiscal staff to complete e-Invoicing submission and submit the CTLP e-Invoicing Template as an attachment.
- The CTLP e-Invoicing Template must be submitted with both the monthly and year to date expense totals.
 - Allowable line items to be utilized for Personnel Salaries are:
 - CTLP Supervisor**
 - CTLP Liaison**
 - CTLP Case Assistant**
 - Payroll Taxes**
 - Fringe Benefits**

- ASAPs may bill for staff members who are temporarily covering the functions of any of the 3 CTLP positions, utilizing the approved UFRs.

CTLP Team Expense Account Reimbursement Procedure:

- Purchase of an item or items necessary to support the CTLP enrolled NF resident's community transition.
- Upload the receipt for the item(s) into the File Attachments section of the CTLP consumer's A&D record.
 - There should be one receipt per CTLP consumer. Do not upload into an individual consumer record a receipt that also has other consumer names.
 - There may be multiple items purchased for one CTLP consumer on the same receipt.
 - The receipt must clearly show the individual cost of each item and the total amount spent.
 - The File Attachment should be entered and labeled as follows:
 - Folder:** Community Transition Liaison Program (CTLP)
 - Description:** Team Expense Account Purchase(s)

- Documentation in the Journals section of A&D must include the provision of items to support the resident's transition to the community and verification of no alternative funding sources.
- Track CTLP TEA spending and submit E-invoicing monthly for cost reimbursement.
 - TEA utilization should be billed in the CTLP Template for e-Invoicing under line item:
 - Program Support**

CTLP e-Invoicing Template

1	CONTRACTOR:							0
2	CONTACT PERSON:							0
3	BILLING PERIOD:	Jul 25 - Jun 26						Jul 25 - Jun 26
4	(Include monthly adjustments.)							
5	CTLP	Jul 25	Aug 25	Sep 25	Oct 25	Nov 25	Dec 25	Jan 26
6	Personnel Salaries							
7	101 CTLP Supervisor	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
8	132 CTLP Liaison	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
9	137 CTLP Case Assistant	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
10	Subtotal Staff	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
11	150 Payroll Taxes	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
12	151 Fringe Benefits	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
13	Total Direct Care/Program Staff	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
14	216 Program Support (CTLP Team Expense Account)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
15	510 Other Direct Admin Expenses	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
16	Total Direct Administrative Exp	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
17								
18	SUBTOTAL PROGRAM COSTS	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
19								
20								
21	PROGRAM TOTAL	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
22								

For questions regarding this Business Rule, please contact the AGE CTLP Team:

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