
Effective Dates: 01/28/1999 - Present

SENSITIVE - NOT TO BE SHARED WITH THE PUBLIC

Basic (02-81)

PM 00206.003 Definition of Technical and Management Assistance

- A. The term “technical and management assistance” is defined as actions undertaken, or sponsored, by SSA to help a State meet the regulatory requirements in its performance of the disability determination function. TMA may range from consultation for the purpose of identifying problems and their solutions to the assumption of a portion of the State's workload until the State is able to meet performance standards. The specific program of TMA provided to a State whose performance is unacceptable will depend on SSA's assessment of the reasons for the State's poor performance as well as availability of resources. A program of TMA may include temporary and expedient measures to provide an immediate boost in the State's performance as well as long-term solutions for the underlying root causes of poor performance that will lead to sustained satisfactory performance. Implicit in the concept of TMA is the intent that the positive results obtained continue as improved DDS performance after the assistance program is terminated. Activities that may be part of an individual State's TMA program may include, but are not limited to:
1. An onsite review of cases processed by the State agency emphasizing adherence to written guidelines.
 2. A fiscal and administrative management review (FAMR) to:
 - a. Identify particular aspects of State agency operations which can receive immediate help and thus improve performance accuracy or processing time; and
 - b. Develop a long-range plan based on the FAMR results to help the State agency prevent its performance from falling below the threshold levels in the future.
 3. A request that necessary administrative measures be implemented (e.g., filling staff vacancies, using overtime, assisting with training activities, etc.).
 4. Provisions for Federal personnel to perform onsite reviews, conduct training, or perform other functions needed to improved performance.
 5. Provisions for fiscal aid to allow for implementation of corrective actions, including overtime, temporary hiring of additional staff, etc., above the authorized budget.
 6. Monitoring and guiding State implementation of recommendations.
- B. The routine day-to-day consultation and communication between SSA and the States may include some activities which could be considered forms of TMA. These activities should continue, of course, within budget limitations, and should not be considered part of a formal plan of TMA.

Link to this section:

(b) (7)(E)

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