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The Role of Evidence and Experts in Social Security's Disability Determination Process in Adult Claims

Participant Bios

Lisa Ekman, JD, is Director of Government Affairs for the National Organization of Social Security Claimants' Representatives. Ekman has been advocating to protect the rights and improve the economic security of people with disabilities, focusing on the Social Security Disability Insurance (SSDI) and Supplemental Security Income (SSI) programs, health care (including Medicare and Medicaid), employment programs, and long-term services and supports, for the past two decades. Ekman is the Chair of the Board of Directors of the Consortium for Citizens with Disabilities (CCD) as well as a Co-Chair of the CCD Social Security and Fiscal Policy Task Forces. Ekman has worked for the Social Security Administration (SSA), on Capitol Hill for republican and democratic chairmen of the Senate Health Education Labor and Pensions Committee, for federal contractors and for non-profit organizations to strengthen federal policy and programs for people with disabilities. Ekman received a JD, *cum laude*, from Georgetown University, a master's in social work from the University of Denver, and a bachelor's in communications from Northwestern University.

Howard Goldman, MD, is a Professor of Psychiatry at the University of Maryland School of Medicine and served as Liaison to the Institute of Medicine (IOM) Standing Committee of Medical Experts to Assist Social Security on Disability Issues. Goldman received joint MD-MPH degrees from Harvard University in 1974 and a PhD in social policy research from the Heller School at Brandeis University in 1978. Goldman is Author or Co-Author of 325 publications in the professional literature. Goldman is the Editor of *Psychiatric Services*, a mental health services research and policy journal published

monthly by the American Psychiatric Association. Goldman also has served on the editorial boards of several other journals, including Health Affairs, the American Journal of Psychiatry and the Journal of Mental Health Policy and Economics. Goldman served as the Senior Scientific Editor of the Surgeon General's Report on Mental Health from 1997-1999 for which Goldman was awarded the Surgeon General's Medallion. During 2002 and 2003 Goldman was a Consultant to the President's New Freedom Commission on Mental Health. In 1996 Goldman was elected to membership in National Academy of Social Insurance (NASI), and in 2002 Goldman was elected to IOM. Goldman is an expert on disability and disability policy. While serving as Assistant Director of the National Institute of Mental Health, he worked closely with the SSA revising policies and regulations for assessing individuals with mental impairments. Goldman has written extensively about this topic, including papers in the Milbank Quarterly and Health Affairs and in his recent book with Gerald Grob, *The Dilemma of Federal Mental Health Policy*. Goldman also served on the Disability Policy Panel for NASI. In 2007 Goldman served on the IOM Committee on Medical Evaluation of Veterans for Disability Compensation. Since 2009 Goldman has been the Chair of the IOM Standing Committee of Medical Experts to Assist Social Security on Disability Issues.

Philip Litteral is the Director of Disability Claims Experts (DCE) and the Immediate Past President and Legislative Affairs Liaison of the National Association of Disability Representatives (NADR). Previously, Litteral worked in Social Security field offices for more than 33 years. While with SSA, Litteral produced and presented nationwide training on disability processing and received an Associate Commissioner's Citation for disability training work. In 2008, Litteral retired from SSA and began DCE. Litteral was elected to the Board of Directors of NADR in 2012 and was elected President in 2017.

Judith Green McKenzie, MD, is Professor and Chief, Division of Occupational and Environmental Medicine (OEM) and Program Director, Occupational Medicine Residency in the Department Emergency Medicine at the University of Pennsylvania Perelman School of Medicine. After graduating from Princeton University, McKenzie went on to Yale University School of Medicine where McKenzie was selected to be a Commonwealth Fellow. McKenzie earned her MPH and completed an occupational medicine fellowship training at the Johns Hopkins Bloomberg School of Public Health. Listed as one of America's top physicians, McKenzie is a Diplomat of the American Board of Preventive Medicine (ABPM)-Occupational Medicine and became a Diplomat of the American Board of Internal Medicine in 1993. McKenzie was honored by the

American College of OEM with its 2015 Kehoe Award for Excellence in Education or Research in OEM. Author of over 100 scientific publications, McKenzie is a Member of the editorial board of the Journal of Occupational and Environmental Medicine, Chair Elect for the Accreditation Council for Graduate Medical Education Residency Review Committee for Preventive Medicine, chair of the National Academies of the Sciences, Engineering and Medicine (NASEM) Consensus Committee on Medical Conditions Expected to Improve with Treatment and a Member of the NASEM Standing Committee of Medical Experts to advise Social Security on Disability Issues and has served on several other NASEM Consensus Committees. McKenzie served on the ABPM Examination Committee, as well as on the National Institute of Occupational Safety and Health Board of Scientific Counselors and has served on several National Academy of Science and Medicine committees. McKenzie's research and clinical work, which emphasize work as a social determinant of health, center on occupational safety and health, work disability, injury prevention, employee wellness and prevention, graduate residency education, and environmental exposures.

L. Scott Muller is a retired Senior Economist at the Office of Research, Evaluation, and Statistics at SSA, where Muller worked from 1978 through 2014. Muller is a Member of the American Economic Association and NASI. Muller holds a bachelor's degree in economics and political science from Syracuse University and a master's degree in economics from the University of North Carolina at Chapel Hill.

Gerald Ray, JD, began a federal career in 1977 with the SSA at its Baltimore Central Office. Ray holds a BA from Pennsylvania State University and a JD from the University of Maryland School of Law. Ray started as a Claims Authorizer in the Office of Disability Operations and, in 1980, became a Hearings and Appeals Analyst with the agency's Office of Appellate Operations in Arlington, VA. Ray joined the Office of Civil Actions in 1983 as a Civil Actions Analyst, and later served as a Branch Chief from 1989 until 1996. In 1996, Ray was appointed as an Administrative Appeals Judge and continued to serve in that capacity. In 2000, Ray Chaired the Appeals Council Process Improvement Initiative. Ray was instrumental in developing the Electronic Case Analysis Tool that the Appeals Council implemented in 2008. In March 2009, Ray was appointed to the Senior Executive Service (SES) Attorney position of Deputy Executive Director in the Office of Appellate Operations.

Leon A. Scales is the Next President of the National Council on Disability Determination Directors (NCDDD) and the Virginia Disability Determination Service (DDS) Director. Scales has held the position of DDS Director for approximately nine years; Scales was previously the VA DDS Deputy Director of Operations. All of Scales' 22 years of work experience has been with the VA DDS, in multiple capacities. Scales has a well-rounded organizational background with experience as a Disability Examiner, Lead Worker, Office/Operations Manager, Local Area Network Coordinator, Budget/Administrative Manager, Business Process Specialist, Director of Operations, and currently Division Director. Scales received a BA in history and MPA in public administration from Virginia Polytechnic Institute & State University (Virginia Tech) and is a graduate of the Commonwealth of Virginia Executive Institute. Scales has earned recognition and many awards for contributions to the Virginia Department for Aging and Rehabilitative Services and the Social Security disability program. Honors include multiple SSA Regional and SSA Associate Commissioners Citations, SSA Deputy Commissioner Operations Leadership Award, and the VA DDS was the 2016 recipient of the SSA Associate Commissioner Phoenix Award. Scales is currently the Philadelphia Region Administrator Representative for the National Disability Interest Group and a member of National Association of Disability Examiners.

Glenn Sklar, JD, was named the deputy commissioner for the Office of Disability Adjudication and Review in January 2010. Sklar was responsible for providing executive leadership for the agency's hearings and appeals functions, overseeing an organization of more than 10,000 employees. Prior to Sklar's appointment, Sklar served as the Assistant Deputy Commissioner for Quality Performance, and as the Associate Commissioner for the Office of Disability Programs in the Office of Retirement and Disability Policy. Sklar has devoted substantial energy to modernizing SSA's disability programs, including automating SSA's disability policies, and in 2008, Sklar received a Presidential Rank Award for Meritorious Service as a Senior Executive. Sklar is a graduate of Tufts University and the Washington College of Law at American University.

Melissa Spencer joined SSA in 1996 and before retiring, served as the Deputy Associate Commissioner for SSA's Office of Disability Policy. Spencer is a graduate of SSA's SES Candidate Development Program. Before entering the SES, Spencer served as the Acting Deputy Associate Commissioner for the Office of Quality Review and led all quality reviews for SSA's programmatic workloads, including disability claims. Spencer redesigned the State DDS

quality review processes by instituting virtual review and SSA's targeted denial review. Spencer has served on several national groups, developing expertise in key areas including childhood disability policy. Spencer provided leadership and guidance to states as the Federal Liaison for the Maryland, Delaware, and West Virginia DDSs. Before joining SSA, Spencer spent 13 years in the Virginia DDS as a Disability Examiner and Manager after beginning a career as a Vocational Rehabilitation Counselor. Spencer holds a Bachelor of Sciences degree in rehabilitation services from Virginia Commonwealth University.

Sara Winn is the President of NADE for fiscal year 2019-2020 and a Disability Examiner at the Louisiana DDS. Winn began a DDS career at the Shreveport, Louisiana DDS in December 2000. Winn has worked at five DDS offices throughout the nation including Lincoln, NE; Fairfax, VA; and Washington, DC. Winn currently works at the Baton Rouge, LA DDS. During Winn's DDS career, Winn has worked as an Examiner, Quality Assurance Specialist, and Supervisor. Winn has adjudicated every type of case and has many years of mentoring and training in the disability program. Winn helped to construct standard operating procedures in the DC office and was part of the Executive Leadership Team. Winn was also a Coach for the DC Government Initiative, Person Centered Organization. In addition, Winn was the Head of the Morale Committee while in Shreveport and DC. Winn continues to serve on the Request for Program Consultation Cadre and National SSI/SSDI Outreach, Access, and Recovery Expert Panel. Winn received a Commissioner's Citation Award in 2011 for a team project while at the Fairfax office. Winn has been a Member of NADE since 2000, but rejoined and became more active in 2013 when moving to the DC DDS. Previously, Winn has served NADE nationally as Mid-Atlantic Regional Director, Communications Director, and President-Elect. Winn attended University of Louisiana at Lafayette where Winn obtained a Bachelor of Arts in 2000. Winn then attended Louisiana Tech University and graduated with a Master of Arts in industrial/organizational psychology in 2003.