



# Social Security Advisory Board

Kim Hildred, Chair  
Henry J. Aaron  
Nancy J. Altman  
Jagadeesh Gokhale  
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Claire Green, Staff Director

## May 28-29, 2020 Board Meeting Minutes

**Location:** Meeting held virtually

**Time:** 8:45am – 4:00pm EST

**Board Members:** Kim Hildred, Chair  
Henry Aaron  
Nancy Altman  
Jagadeesh Gokhale  
Bob Joondeph

**Board Staff:** Claire Green, Staff Director  
Diane Brandt, Research Director  
Bethel Dejene, Management Officer  
Sunny Bick, Management Analyst  
Mayana Bonapart, Policy Analyst  
Pamela Crawford, Senior Advisor  
Joel Feinleib, Senior Advisor  
Lillie Heigl, National Academy of Social Insurance Fellow  
Conway Reinders, Lead Policy Analyst  
Jenn Rigger, Senior Advisor  
Omar Shalabi, Policy Analyst  
Emma Tatem, Lead Policy Analyst

**Participants:** **David Autor**, Ford Professor of Economics, Massachusetts Institute of Technology  
**Chantel Boyens**, Principal Policy Associate, Urban Institute  
**Manasi Deshpande**, Assistant Professor in Economics, The University of Chicago  
**Howard Goldman**, Professor of Psychiatry, University of Maryland School of Medicine  
**Nicole Maestas**, Associate Professor of Health Care Policy, Department of Health Care Policy, Harvard Medical School  
**L. Scott Muller**, Senior Economist, Office of Research, Evaluation, and Statistics, SSA (Retired)  
**Harold Pollack**, Helen Ross Professor, School of Social Service Administration, The University of Chicago  
**Jack Smalligan**, Senior Policy Fellow, Urban Institute  
**Art Spencer**, Associate Commissioner for Disability Programs, Social Security Administration (Retired)  
**Melissa Spencer**, Deputy Associate Commissioner, Office of Disability Policy, Social Security Administration (retired)  
**David Stapleton**, Disability Policy Researcher, Treehouse Economics LLC

### **Day 1- May 28, 2020**

The day started off with the Board hosting a roundtable entitled “Re-thinking the Disability Determination Process.” The roundtable commenced with an overview of two proposals by panel experts to improve Social Security Administration (SSA)’s disability determination process. Chantel Boyens and Jack Smalligan presented their research on funding flexibility to test process improvement ideas, specifically changes to the reconsideration step of the adjudication process and Dave Stapleton discussed a re-envisioned disability determination process. Participating experts responded to these proposals and put forth additional ideas. Highlights discussed included changes to and evidence for disability program eligibility criteria, caseload backlogs and applicant wait time, definitions of substantial gainful activity, medical impairment listings (and associated severity) and disability grid rules used by SSA. Some experts compared the SSA model to social security models in other countries.

During the session, “SSA’s Approach to Quality Assurance and Process Validity,” participants reviewed and debated program integrity and quality assurance options

of the disability claims process, followed by questions from the public. The day continued with a presentation and an assessment of ideas to improve evidence collection and review at the initial and reconsideration levels of the disability determination process. Ideas highlighted medical consultations to support the disability review process and reducing the caseload backlogs (including virtual consultations via telehealth/telemedicine and associated risk management) and access challenges to medical experts. Also discussed was broadening case area expertise for consultative exam assessments, including use of other medical care workers (including nurse practitioners) as medical expert evaluators. Some questioned the weight of the medical consultation overall in the disability case review and others noted successful approaches used in other countries' models.

After breaking for lunch, the roundtable session "SSA's Approach to Quality Assurance and Process Validity," continued with further discussion and information sharing on quality assurance, including tools to improve the disability determination process. Additional topics included learning from other federal agency experiences, learning from and mitigating the effects of COVID-19 operational restrictions experienced across Social Security, and the value of research and developing the evidence base for improving the disability determination process. The day adjourned after panelists' final comments and questions from the public were addressed.

## **Day 2- May 29, 2020**

On May 29, 2020 the Board met in executive session.

I certify that the public minutes written for the May 28-29, 2020 meeting of the Social Security Advisory Board are correct.



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**Kim Hildred**, Chair