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
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