

Kim Hildred, Chair
Nancy J. Altman
Jagadeesh Gokhale
Bob Joondeph

Claire Green, Staff Director



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Public Board Meeting Minutes

July 29 – 30, 2021

Day One July 29, 2021

Location: Meeting held virtually on Zoom

Time: 10:00 am – 4:00 pm EST

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

Board Staff: **Claire Green**, Staff Director
Diane Brandt, Research Director
Bethel Dejene, Management Officer
Mark Benavides, Summer Associate
Sunny Bick, Management Analyst
Cheri Cannon, General Counsel
Pamela Crawford, Senior Advisor
Conway Reinders, Lead Policy Analyst
Jenn Rigger, Senior Advisor
Omar Shalabi, Policy Analyst
Emma Tatem, Lead Policy Analyst

Day One

10 am – 12:45 pm **Executive Session**

12:45 – 4 pm **Roundtable on Medical Evidence Collection –
The Cornerstone of Social Security Disability
Determination**

12:45 – 1 pm

Welcome

Bob Joondeph, Chair, Social Security Advisory Board

1 – 1:30 pm

The Evidence Collection Process – An Introduction

Social Security and its state-partner Disability Determination Services (DDS) rely on medical evidence to determine eligibility for Social Security disability programs. This session will introduce the types and formats of evidence and describe the roles and responsibilities of those involved in its collection.

Bob Joondeph, Chair, Social Security Advisory Board
(moderator)

Recorded presentation:

<https://vimeo.com/583012524/a616e65fbe>

1:30 – 2:30 pm

State Approaches to Collecting Evidence

Social Security defines the acceptable forms and sources of medical evidence and supports different technologies that facilitate collection. COVID presented each state with unique challenges, as health care service provision was altered during the pandemic. This session will highlight strategies to improve the process.

Kim Hildred, Member, Social Security Advisory Board
(moderator)

Recorded presentation – [0:46:45](#)

2:30 – 2:45 pm

Break

2:45 – 3:50 pm

State Approaches to Collecting Evidence (continued)

Recorded presentation - [01:34:23](#)

3:50 – 4:00 pm

Conclusion

Bob Joondeph, Chair, Social Security Advisory Board

Conclusion: [02:34:44](#)

Participants

Marjorie Garcia, President, National Association of Disability Examiners (NADE); Disability Analyst, Oregon DDS

Paul Kreger, Medical Professional Relations Officer, Iowa DDS

Liz McLaren, Immediate Past President, National Council of Disability Determination Directors and Administrator, Iowa DDS

Jennifer Nottingham, Legislative Director, NADE; Operations Manager, Nevada DDS

Marjorie Portnoy, Managing Partner, Portnoy Disability Practice in Radnor, Pennsylvania

Teresa Sizemore-Hernandez, Professional Relations Team Leader, Virginia DDS

Melissa Spencer, former Deputy Associate Commissioner, Office of Disability Policy, SSA (*retired*)

Sara Winn, Immediate Past President, NADE; Program Specialist, Louisiana DDS

Day Two

10 am – 1 pm

Executive Session

1:00 – 3:30 pm

Speaker Series on Customer Experience

The Board will host its fourth systems speaker series event on customer experience as a driver for modernizing IT. This session will focus on how the Department of Veterans Affairs improved the veteran experience by collecting, capturing, and analyzing data and identifying pain points through human-centered design.

Barbara C. Morton, Deputy Chief Veterans Experience Officer, Veterans Experience Office, Department of Veterans Affairs

Bob Joondeph, Chair, Social Security Advisory Board (*moderator*)

Recorded presentation:

<https://vimeo.com/582128312/84ee559fac>

CX Presentation: [0:7:40](#)

- Q&A [0:31:38](#)

Institutionalizing CX within the VA [0:59:33](#)

- Q&A [01:18:59](#)

CX Cookbook [01:25:38](#)

- Q&A [01:42:32](#)

Lessons for IT Modernization [01:59:18](#)

- Q&A [02:07:39](#)

Conclusion [02:23:12](#)

3 – 4 pm

Executive Session

I certify the public meeting minutes' accuracy for the Social Security Advisory Board's July 29-30, 2021, meeting.



Bob Joondeph