# Artificial Intelligence and the Medical Record in the Context of Social Security Disability Evaluations

A WORKSHOP

## MEETING AGENDA

### Purpose

- To explore current and upcoming implementations of artificial intelligence (AI) that create, modify, edit, or otherwise interact with patient medical records in the context of disability evaluations.
- To discuss the quality and usefulness of AI being used in clinical practice (e.g., symptom assessment, imaging analysis, automated documentation and predictive diagnostics) and how the medical profession evaluates accuracy and validity of emerging AI technologies.
- To understand the prevalence and effectiveness of AI usage among various medical providers (e.g., geography, medical professions and age) and its impact on the integrity of medical documentation and the decision-making processes it informs.

## MONDAY, APRIL 6, 2026 (1:00—5:00PM ET)

### 1:00–1:45 OPENING SESSION

**Welcome Remarks**
**Jack Dennerlein**, *Workshop Chair*
Dean, Sargent College of Health and Rehabilitation Services
Boston University

**Sponsor Remarks**
**Robert Weathers**
Head of Disability Policy
Social Security Administration

**Vincent Nibali**
Policy Analyst
Social Security Administration

### 1:45–2:50 SESSION 1: FOUNDATIONS & LANDSCAPE OF AI ADOPTION IN MEDICAL SETTINGS

**Purpose:**

- Consider how the medical profession defines and uses AI (e.g., large language models, functional models, deep learning, symbolic reasoning, and evolutionary algorithms, among others).
- Explore the use and effectiveness of AI across the medical profession considering clinician age, time since training, geographic location, and the community in which services are provided. (E.g., how do medical professionals with diverse background and across various settings use different AI products?)

- Explore the practical benefits and any potential negative outcomes seen by medical providers currently using AI system.

Moderator: **Michael Hasselberg**, Nebraska Medicine, Planning Committee Member

**1:50—2:00** **AI in Medicine – Definitions and Paradigms**

**Philip R. O. Payne**
Chief Health AI Officer
BJC Health System and Washington University School of Medicine

**Jackie Gerhart**
Chief Medical Officer
EPIC

**2:00—2:50** **50-minute Panel Discussion & Audience Q&A**

Moderator: **Michael Hasselberg**, Nebraska Medicine, Planning Committee Member

**Margaret Lozovatsky**
Digital health physician leader

**Jennifer Stoll**
Chief External Affairs Officer
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**Philip R. O. Payne**
Chief Health AI Officer
BJC Health System and Washington University School of Medicine

**Jackie Gerhart**
Chief Medical Officer
EPIC

**2:50—3:05** **BREAK**

**3:05–4:45** **SESSION 2: AI QUALITY AND TRUSTWORTHINESS**

**Purpose:**

- Consider how the medical profession evaluates the usefulness and accuracy of AI products.
- Explore how AI systems interact with handwritten and historic medical provider notes.
- Develop an understanding of how SSA can identify when a medical record was created or manipulated by AI.
- Examine the perspective of medical providers regarding what AI might miss or exclude from final medical records.

Moderator: **Peter Embi**, Vanderbilt University, Planning Committee Member

**AI Accuracy, Utility and Error-Checking in Practice**

**Jodyn Platt**
Associate Professor
University of Michigan

**Jinoos Yazdany**
Professor & Executive Director of AI Monitoring in Clinical Care
University of California San Francisco

**John Lee**
EPIC Consultant
HIT Peak Advisors

**4:15–4:45** **Panel Discussion and Audience Q&A**

**4:45—5:00** **CLOSING REMARKS**
**Jack Dennerlein**, *Workshop Chair*
Dean, Sargent College of Health and Rehabilitation Services
Boston University

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## TUESDAY, APRIL 7, 2026 (9:00AM – 5:00PM ET)

**9:00—9:10** **DAY 2 OPENING PLENARY**

**Welcome & Recap**
**Jack Dennerlein**, *Workshop Chair*
Dean, Sargent College of Health and Rehabilitation Services
Boston University

**9:10—9:30** **Envisioning the Future of AI in Medical Records**
**Karandeep Singh**
Chief Health AI Officer
UC San Diego Health

**9:30—9:45** **Discussion and Audience Q&A**

**9:45—10:00** **BREAK**

## SESSION 3: CLINICAL USE CASES – DIAGNOSIS, TESTING, AND IMAGING

**10:00—11:15** **PART A: AI USE CASES FOR CLINICAL EVALUATION AND DIAGNOSIS**
**Purpose:**

- Current and anticipated uses of AI in (1) the interpretation of symptoms or other patient reports and the conceptual relations to assuring accuracy and validity in symptom evaluation; (2) arriving at medical diagnosis for a patient

- Consider indicators used by the medical community to identify or suggest errors or misinterpretations in the output of AI systems or software.

Moderator: **Margaret Lozovatsky**, Digital health physician leader, Planning Committee Member

*10-minute presentations or remarks*

**Kensaku Kawamoto**
ReImagine EHR
University of Utah

**Vincent Liu**
Chief Data Officer & Senior Research Scientist
Kaiser Permanente

**Rebecca Brendel**
Director, Center for Bioethics
Harvard Medical School

**Grace Cordovano**
Founder
Enlightening Results

**10:45—11:15 30-min Panel Discussion and Audience Q&A**

**11:15—12:30 PART B: BENEFITS AND RISKS IN AI FOR CLINICAL IMAGING AND DIAGNOSIS**

**Purpose:**

- Explore benefits, risks, and evidence of AI interpretation of diagnostic information such as imaging.
- Consider indicators used by the medical community to identify or suggest errors or misinterpretations in the output of AI systems or software.
- How AI helps, or could help, guide medical decision-making regarding the need for additional diagnostic or laboratory testing.

Moderator: **V.G. Vinod Vydiswaran**, University of Michigan, Planning Committee Member

**Adam Flanders**
William E. Conrady, MD Professor in Radiology & Vice Chair for Informatics
Thomas Jefferson University

**David Dorr**
Chief Research Information Officer & Medical Informatics
Professor of General Internal Medicine & Geriatrics, Oregon Health & Science University

**Judy Wawira Gichoya**
Associate Professor, Department of Radiology and Imaging Sciences
Emory University School of Medicine

**Peter McCaffrey**
Chief AI Officer & Director, Pathology Informatics
University of Texas Medical Branch

**Robert Ochs (*invited*)**
Director, Office of Radiological Health
U.S. Food and Drug Administration

**Panel Discussion**

**12:30—1:30 LUNCH BREAK**

**1:30—2:30 PART C: CLINICAL CORROBORATION & FUNCTIONAL PROOF – AI AND THE MEDICAL RECORD FOR CLAIMS OUTCOMES**

**Purpose:**

- Explore how SSA can identify when AI has been used in care delivery (e.g., recognizing records created or influenced by AI) and consider how such information should be evaluated in adjudication.
- Learn from clinicians who regularly assess functional capacity about the AI tools they currently use or plan to use and identify necessary guardrails.
- Discuss the practical benefits and potential risks of AI tools that affect disability evaluation and claims decisions.

Moderator: **Melissa Spencer**, Social Security Administration (retired), Planning Committee Member

**Social Security Adjudicator Perspective** (TBD) ***(10 mins)***

**Haipeng (Mark) Zhang**
Director, VHA Office of Healthcare Innovation and Learning
U.S. Department of Veterans Affairs

**Robert Latz**
Chief Information Officer
Trinity Rehab Services

**Amanda Brewer**
Chief Executive Officer
Brewer Physical Therapy

**2:30—3:15 Panel Discussion (All Session 3 Panelists) & Audience Q&A**

Facilitator: **Jack Dennerlein,** Workshop Chair

**3:15–3:30** **Break**

**3:30–4:30** **SESSION 4: THIRD-PARTY AI INTERPRETATION, GOVERNANCE, AND RISK MANAGEMENT**

**Purpose:**

- Consider the medical community and medical providers' concerns with third party use of AI to interpret records directly created by medical providers.
- Explore concerns within the medical profession of how AI could be used to commit medical or disability fraud and opportunities recognized by the medical profession to use AI to detect or mitigate medical and disability fraud.
- Examine any indicators used by the medical community to identify or suggest errors or misinterpretations in AI output.

Moderator: **Kenrick Cato,** Penn Nursing, Planning Committee Member

**Christina Silcox**
Research Director for Digital Health
Duke Margolis Institute for Health Policy

**Merage Ghane**
Director of Responsible AI
Coalition for Health AI (CHAI)

**4:30–5:00** **CLOSING PLENARY**

**Leadership Roundtable**
Workshop Takeaways & Open Floor Discussion/Q&A

**Final Remarks**
**Jack Dennerlein (Chair)**
Dean, Sargent College of Health and Rehabilitation Services
Boston University