

Stephen R. Levinson, M.D.

Résumé For Medical Management & Consultation

Medical Training:

EDUCATION

College
(1963-1967)

Johns Hopkins University; Baltimore, Maryland
Degree: B.A.
Major Subject: Biology
Honors: Phi Beta Kappa, Alpha Epsilon Delta

Medical School
(1963-1971)

Johns Hopkins School of Medicine; Baltimore, Md.
Degree: M.D.

Internship
(1971-1972)

University of California at San Diego
Type: Surgical

Surgery Resident
(1972-1973)

UCLA/Wadsworth VA Hospital; Los Angeles, Calif.
Type: General Surgery

Residency
(1973-1976)

University of California at Los Angeles
Type: Head and Neck Surgery
Chairman: Paul H. Ward, M.D.

CERTIFICATION

National Boards, 1972
American Board of Otolaryngology, 1976

MEDICAL PRACTICE

Ear Nose and Throat & Facial Plastic Surgery Associates, P.C.
Fairfield, Conn. Trumbull, Conn. 1976 - 2002

MEDICAL SOCIETIES

American Academy of Otolaryngology - Head and Neck Surgery (Fellow)
American Academy of Facial Plastic and Reconstructive Surgery (Fellow)
American College of Surgeons (Fellow)
American Medical Association

COMPLIANCE & TECHNOLOGY SOCIETIES

American Association of Professional Coders (AAPC)
American Health Information Management Association (AHIMA)
Association of Healthcare Auditors and Educators (AHCAE)
Health Information Management Systems Society (HIMSS)

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MEDICAL MANAGEMENT:

- 1) Connecticut State Medical Society **Committee on Medicare Chairman**, 1991 – 1994 1987 - present
- 2) Connecticut Medicare Insurer (Travelers) **Carrier's Advisory Committee, Executive Committee** 1992 - 2002
- 3) **Instructor in Evaluation and Management (E/M) Coding**, trained by American Medical Association and HCFA in 1991 1991 – present
- 4) Magellan Specialty Health **Medical Director for Otolaryngology & Evaluation and Management Services (E/M)** 1995 - 1999
- 5) **Connecticut Delegate to AMA for Issues on E/M Coding** – A.M.A, “Fly In” meeting April 27, 1998
- 6) **Quality Improvement Committee** of the American Academy of Otolaryngology -Head & Neck Surgery 1993 - 2000
- 7) **Task Force on "Physician Referral Guidelines"** for the American Academy of Otolaryngology - Head and Neck Surgery, 1993 - 1995
- 8) **Insurer Relations Committee** of the American Academy of Otolaryngology - Head & Neck Surgery, 1999 - 2002
- 9) **AAO-HNS Board of Governors “Physicians Reimbursement Task Force”** 2001-2003
- 10) **Committee on Inter-specialty Relations, Quality Assurance, and Socioeconomic Affairs (Including Coding)**, American Academy of Facial Plastic & Reconstructive Surgery, 1991 - 1994
- 11) **Committee on Insurability** of the Fairfield County Medical Association, **Chairman**, 1995 – 1999 1985 - 1999
- 12) **Medical Advisory Board**, Bridgeport Surgical Center 1985 - 1999
- 13) **Delegate** from Fairfield County Medical Assoc. to the Conn. State Medical Society 1994 – 2012
- 14) **Compliance expert for physicians’ attorneys** in Multi-District Litigation (MDL) lawsuit against managed care insurers for non-compliant coding and payment practices 2002 - 2005
- 15) **Cigna Physicians’ Advisory Committee (PAC)**, established under settlements of the national class action law suits 2004 - 2007

INSTRUCTION COURSES & PRESENTATIONS:

- 1) **“E/M Coding and Documentation”**; instruction courses presented for physicians and staff 1992 - present
- 2) **“Optimizing Office Care, Compliance, and Economic Survival in the 21st Century”**; Presented at American Academy of Otolaryngology – Head & Neck Surgery annual meeting, 1998 – 2005 (Also presented to numerous other physician groups)
 - a) Analyzing Overhead Expenses and Medical Practice Profitability 2002 – 2004
 - b) Customized Tools for Quality Care, Compliance, and Efficiency 1998 – 2005
 - c) Practice Survival: Combating Non-Compliant Insurer Tactics 2002 - 2005
- 3) **Easy E/M Coding and Documentation Guidelines**
 - a) For physicians
 - b) For insurance carriers, Medicare intermediaries, and TPAs
 - c) For compliance
 - i) Medical centers
 - ii) Teaching hospitals
 - iii) Multi-specialty groups
- 4) **"Partnership Dynamics"**; presented at annual meeting of the American Academy of Otolaryngology - Head and Neck Surgery 1991 – 1996
Presented at annual meeting of Association of Otolaryngologic Administrators 1996
- 5) **"Panel on Coding and Reimbursement"**; presented at annual Symposium on Facial Plastic Surgery, New Jersey Chapter of American Academy of Facial Plastic and Reconstructive Surgery 1993
- 6) **"Physician Referral Guidelines"**; presented at the Practice Parameters Forum of the American Medical Association, Chicago June, 1993
- 7) **“Managed Care Evolution – Beast or Beauty?”**; sponsored by Rhone-Poulenc Rorer, New Haven, Connecticut 1995
- 8) **“Using Interactive Technology to Link Terms and Conditions of Managed Care Contracts to Clinical Pathways at the Point of Care”**; 3 hour workshop presented in conjunction with Dr. Ed Zalta (of Capp Care). Presented at 3-day conference on “Merging Clinical and Financial Data in Integrated Delivery Systems.” Sponsored by the Institute for International Research Chicago, 1997
- 11) **“Establishing Referral Guidelines to Create a Foundation for Quality Care, Improved Patient Access and Increased Cost Effectiveness”** Presented at 3 day conference on “Healthcare Referral Management.” Sponsored by the Institute for International Research, Boston Massachusetts June 1997

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- 12) **“When Bad Things Happen to Good Doctors: Protecting Against and Dealing with Fraud and Abuse Insurance Audits”** Roundtable discussion for Fairfield County Medical Association, Stamford, Conn., April, 1999
- 13) **“Physician Analysis of Non-Compliant Insurer Reimbursement Practices”** 2003
Presented at Milberg Weiss legal offices (New York) to executive directors and attorneys for approximately fifteen state medical societies involved in national class action litigation
- 14) **“Physician Analysis of Settlement Agreement in the National Class Action Lawsuit,”** June, 2003
Presented at the American Medical Association Legal Consortium meeting,
- 15) **“Evaluating EHR Functionality at the Point of Care,”** presented at HIT Summit West conference, San Francisco March, 2005
- 16) **“Practical E/M Solutions for Quality Care,”** presented at American Medical Association's CPT Symposium November 2005
- 17) **“Practical E/M Solutions for Quality Patient Care,”** American Academy of Professional Coders' Annual Meeting April 2006
- 18) **“Practical E/M: Documentation & Coding Solutions for Quality Care,”** Webcast with Mary Stanfill, CPC (of AHIMA) for AHIMA May, 2006
- 19) **“Quality, Compliance, and Funding Requirements for the Next Generation of Electronic Health Records,”** Health Information Technology Summit (Third Annual), sponsored by eHealth Initiative September 2006
- 20) **“Practical E/M Solutions to Optimize Medical Quality Compliance and Efficiency,”** Texas Gulf Coast Billing Coding and Compliance Symposium October 2006
- 21) **“Meeting E/M Compliance and Quality Standards with Out Next Generation of EHRs,”** Fourth Health Information Technology Summit, sponsored by eHealth Initiative, Washington, D.C. March 2007
- 22) **“Workforce Needs for Physicians’ Health Information Transformation”** Fourth Health Information Technology Summit, sponsored by eHealth Initiative, Washington, D.C. March 2007
- 23) **“Medicare Reimbursement & Benefits of E/M Compliance”**
Part I: Practical E/M Solutions
Part II: Medicaidization of Our Payment System
Organized Medical Staff Section (OMSS) of the American Medical Association, Annual Meeting, Chicago, Illinois June 2007

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- 24) **“Medicare Reimbursement & Benefits of E/M Compliance,”** New Jersey Chapter of American College of Surgeons, Lawrenceville New Jersey December 2007
- 25) **“Practical E/M for Auditors” and “The Pivotal Role for Coders in the World of Electronic Health Records,”** Minnesota Chapter American Academy of Professional Coders, Annual Meeting, Minneapolis Minnesota December 2007
- 26) **“Practical E/M: Solutions to Optimize Medical Quality, Compliance, & Efficiency,”** webcast for Illinois State Medical Society, Chicago Illinois February 2008
- 27) **“Practical E/M: Solutions to Optimize Medical Quality, Compliance, & Efficiency,”** Indiana State Medical Society, Indianapolis Indiana March 2008
- 28) **“E/M Coding, Compliance & Audits,”** Gastroenterology Practice And Endoscopic ASCs Challenges and Opportunities 2008, Knoxville Tennessee April 2008
- 27) **“Practical E/M: Solutions to Optimize Medical Quality, Compliance, & Efficiency,”** American Health Information Management Association (AHIMA), Physician Practice Council Annual Meeting, Chicago Illinois May 2008
- 28) **“The Pivotal Role for Coders in the World of Electronic Health Records,”** American Academy of Professional Coders, Annual Meeting, Orlando Florida June, 2008
- 29) **“Team Strategies for Compliance and Quality Care,”** American College of Medical Coding Specialists, Annual Meeting, Las Vegas Nevada July, 2008
- 30) **“Practical E/M: Integrating Compliance Principles into Physician Work Flow to Promote Quality Care, Efficiency, and Data Integrity,”** American Health Information Management Association (AHIMA), Annual Meeting, Seattle Washington October 2008
- 31) **“Charting a New Course: How to Offer a Measurably Higher Level of Patient Care at Nursing Homes and Hospitals with New HIM Tools,”** American Health Information Management Association (AHIMA), Annual Meeting, Seattle Washington October 2008
- 32) **“EHR Chart Auditing Essentials,”** Association for Healthcare Auditors and Educators, 8-hour workshop, Dallas Texas July 2009
- 33) **“Electronic Health Records and the Coding Conundrum: He Said She Said,”** (co-presentation with Cindy Parman, FCS, PCS) American College of Medical Coding Specialists, annual meeting, Philadelphia Pennsylvania July 2009
- 34) **“Practical EHR: Electronic Health Record Solutions for Compliance and Quality Care”;** Connecticut Urology Specialty Society, Plantsville Ct. September 2009
- 35) **“E/M Roundtable: E/M Issues & Potential Solutions for Coders and Physicians,”** American Health Informatics Association (AHIMA), annual national meeting, Grapevine Texas October 2009

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- 36) **“Enhancing HIM Effectiveness & Optimizing Revenue Cycle Management Through Compliant Inpatient Documentation Tools for Physicians”**; American Health Informatics Association (AHIMA), annual national meeting, Grapevine Texas October 2009
- 37) **“The Pivotal Role for IM and Coders in Health Information Transformation for Physicians”**; American Health Informatics Association (AHIMA), annual national meeting, Grapevine Texas October 2009
- 38) **“Health Information Transformation: Toolkit for Achieving EHR Goals for Quality Care, Compliance, and Data Integrity”**; Medical Group Management Association (MGMA), annual national meeting, Denver Colorado October 2009
- 39) **“Physicians and EHR Auditing Issues,”** Association for Healthcare Auditors and Educators, annual national meeting, Denver Colorado October 2009
- 40) **Practical E/M and EHR Workshop**, Healthy Ocala HIE Meetings, Ocala Florida Nov 2009 & Feb 2010
- 41) **“Anatomy for Coders: Otolaryngology – Head & Neck Surgery,”** American Academy of Professional Coders, annual national meeting, Jacksonville Florida June 2010
- 42) **“Is Meaningful Use Certification Meaningful Enough for Your Medical Organization?”** semi-annual meeting of Connecticut AHIMA (CtHIMA), North Haven, Connecticut Sept. 2010
- 43) **“E/M Roundtable,”** American Health Informatics Association (AHIMA), annual national meeting, Orlando, Florida September 2010
- 44) **“Ensuring Meaningful EHR Designs and Functionality for Inpatient and Outpatient Medical Organizations,”** American Health Informatics Association (AHIMA), annual national meeting, Orlando, Florida September 2010
- 45) **“Advanced E&M Chart Auditing Techniques: Bridging the Chasm Between Compliance, Quality Care, and Productivity,”** American Academy of Professional Coders, regional meeting, Springfield Massachusetts October 2010
- 46) **“Documentation and Coding Compliance: Otolaryngology – Head & Neck Surgery,”** American Academy of Professional Coders, regional meeting, Springfield Massachusetts October 2010
- 47) **“EHR Chart Auditing Techniques,”** Association for Healthcare Auditors and Educators (AHCAE) annual national meeting, Las Vegas Nevada October 2010
- 48) **“Electronic Medical Records – Are You Ready for Them? Are They Ready for You?”** Connecticut Eye Physicians semi-annual meeting January 2011
- 49) **“EHR Documentation Analysis and Auditing Techniques,”** Series of 6 webinars for the Association of Healthcare Auditors and Educators, March & April 2011

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- 50) **“E/M and Electronic Record Compliance Roundtable,”** American Academy of Professional Coders (AAPC), annual national meeting, Long Beach California April 2011
- 51) **“Is Meaningful Use Certification Meaningful Enough for Your Medical Organization,”** American Academy of Professional Coders (AAPC), annual national meeting, Long Beach California April 2011
- 52) **“Medical Necessity – The Auditors’ Dilemma; and the Foundation of Compliant Coding and Documentation,”** Association for Healthcare Auditors and Educators (AHCAE) annual national meeting, Orlando Florida September 2011
- 53) **“EHR & E/M Auditing Issues – Bridging the Chasm Between Quality Care, Compliance, & Electronic Record Designs,”** Association for Healthcare Auditors and Educators (AHCAE) annual national meeting, Orlando Florida September 2011
- 54) **“ENT Anatomy for Coders,”** Academy of Professional Coders (AAPC), annual national meeting, Las Vegas April 2012
- 55) **“Hospital Admission vs. Observation: Compliance Requirements & Preparing for the RAC Challenge,”** Connecticut Chapter American Academy of Professional Coders, Bridgeport Ct. May 2012
- 56) **“Pathophysiology: Understanding Disease Processes,”** AAPC regional workshop in Boston, Massachusetts August, 2012
- 57) **“Conquering Auditing’s Everest: E/M Auditing for Electronic Health Records,”** Association for Healthcare Auditors and Educators (AHCAE) annual national meeting, San Antonio Texas October, 2012
- 58) **“Taming the RAC Monster: Auditing RAC Audits and Protecting Your Organization from Economic Devastation,”** AHCAE annual conference, San Antonio Texas October, 2012
- 59) **“Enhanced Clinical Documentation (ECD) to Promote CDI,”** AHCAE annual conference, San Antonio Texas October, 2012

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PUBLICATIONS:

- 1) **“Will Technology Change Health Care?”**, Business Digest of Greater Bridgeport October, 1995
- 2) **“Providing Health Care: Quality and Savings?”**; Group Practice Journal July/August, 1996
- 3) **“Audits & Edits,”** E/M Coding Newsletter for auditors and professional coders, in the Magellan Specialty Health system, published 3X per year, published 3X per year 1998 - 2000
- 4) **“Net-Works,”** Coding and auditing Newsletter for physician reviewers of Magellan Specialty Health, published annually 1997 - 2000
- 5) **“Want to be Paid Based on Skill? Then Embrace E&M System,”** letter to the editor American Medical News, p. 26 May 21, 2001
- 6) **“Practical E/M: Documentation & Coding Solution for Quality Care,”** American Medical Association, First Edition November, 2005
- 7) **“Practical EHR: Electronic Record Solutions for Compliance and Quality Care”** American Medical Association June, 2008
- 8) **“EHR Documentation: A Physician’s Perspective,”** sidebar in Practice Brief on “Quality Data and Documentation for EHRs in Physician Practice,” Journal of AHIMA, August 2008, page 45 (note: published without an identifying by-line for the sidebar) August, 2008
- 9) **“Practical E/M: Documentation & Coding Solution for Quality Care, 2nd edition”** American Medical Association December, 2008
- 10) **“The Perfect Storm,”** Medical Economics, (cover article April 3 2009), lead author (co-authors were Deborah Grider, CPC, CPC-H, CPC-P, CCS-P, CCP; Robin Linker, CPC, CPC-H, CCS-P, MCS-P; and Susan Thurston, CPC, CPC-H, CMM, CCS-P, MCS-P) April 3, 2009
- 11) **HITr – The “New” Fraud and Abuse Crisis: A Bump or Evolution in the Electronic Road?** Blog for HIMSS, <http://blog.himss.org/2012/10/19/the-new-fraud-and-abuse-crisis-a-bump-or-evolution-in-the-electronic-road/> October 19, 2012

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CONSULTATION ORGANIZATION AFFILIATIONS:

- 1) **ASA, LLC** consulting organization. Addresses issues of medical compliance, documentation, coding, office management and efficiency, and dealing with insurer non-compliance 1995 – present
- 2) Consultant for Capp Care (national managed care company) concerning: 1993 – 1995
 - a) Development and implementation of **Physician Referral Guidelines**, in computer-integrated managed care setting
 - b) Assessing integration of computerized "**Easy E/M Coding**" into computer-integrated managed care setting
- 3) Consultant for Prospective Payment Specialists, El Segundo California 2009 - present
 - a) Documentation and coding compliance
 - b) Addressing RAC audit issues
- 4) Consultant for HCPro, Danvers Massachusetts 2010 - present
 - a) Documentation and coding compliance
 - b) ICD-10 education
- 5) Consultant for Private Practice Group, New Jersey 2010 - present
 - a) Documentation and coding compliance
 - b) RAC audit issues

POLICY FORUMS ATTENDED:

- 1) AMA Instructor Training Seminar for **Evaluation/Management Coding ("E/M Coding")**. Attended as representative of Connecticut State Medical Society and of the American Academy of Facial Plastic and Reconstructive Surgery October, 1991

- 2) **Annual Legislative Day**, Washington, D.C.; sponsored by the American Academy of Otolaryngology - Head & Neck Surgery. Including personal meetings with Senator Dodd, Congressman Schays, Congresswoman Nancy Johnson, Congresswoman Rosa DeLauro; also with health policy advisors for Senator Lieberman and Senator Kennedy; 1992, 1993, 1994, 1995, 1996, 1998, 1999, 2000, 2001, 2003, 2004

- 3) **Practice Parameters Forum** of the American Medical Association, Chicago 1993

- 4) **"1993 Connecticut Conference on Health Care"**; sponsored by Senator Joseph Lieberman, 1993

- 5) **"The Windy City Symposium"**; sponsored by the American Academy of Otolaryngology - Head & Neck Surgery (includes review of managed care, capitation, measurement of quality and cost of care; Chicago, 1995, 1996

- 6) In Connecticut, personal or group meetings with Conn. Senator Chris Dodd, and Conn. Representatives Chris Schays, Rosa DeLauro, and Nancy Johnson

- 7) **A.M.A. "Fly-in" meeting** on E/M Coding. Attended as Conn. state representative, as one of 300 physicians and administrators to review the 1997 edition of the "Documentation Guidelines" Chicago, 1998

- 8) **eHealth Initiative national conferences** on Health Information Technology and Connecting Communities 2004 – 2010

AWARDS:

- National Physician Recognition Award**, American Academy of Otolaryngology - Head and Neck Surgery, 1994
- Best Physicians in America** (voted by physicians), 1998 – 2002
- Listed in Faulkner & Gray's *Survey of Guideline Developers and Contributors*, in "Practice Guidelines" CD-ROM 1999
- Who's Who in Medicine & Healthcare**, 2000 – 2002 editions
- Who's Who in Executives & Business**, 2000 – 2002 editions

MEDICAL POLICY CONTRIBUTIONS:

- 1) **Evaluation/Management ("E/M") Documentation and Coding:** 1995 – present
 - a) Development and implementation of “Intelligent Medical Records” for compliant and efficient E/M documentation and coding (through ASA, LLC)
 - b) Author of **Practical E/M: Coding and Documentation Solution for Quality Care**,
 - i. Published by the American Medical Association, in November 2005
 - ii. Second edition published by the AMA, in December 2008
 - c) **Website:** www.PracticaleM.com
 - d) **Website for creation of customized IMR forms** (planning stages, in coordination with American Medical Association)
 - e) **Webcast for American Health Information Management Association (AHIMA), May, 2006**
 - f) **Member of Workshop Faculty for the American Academy of Professional Coders (AAPC)**
2006 - 2007
- 2) **Electronic Health Records**
 - a) Development and implementation of “Intelligent Medical Records” screens for compliant and efficient E/M documentation and coding using the electronic history and physical
 - b) Development of concept of “Health Information Transformation” (HITr) for effective software customization and physician preparation preceding EHR implementation
 - c) Author of **Practical EHR: Electronic Record Solution for Compliance & Quality Care**,
Published by the American Medical Association, in June, 2008
- 3) **Health System Evolution**
 - a) eHealth Initiative (2004 – 2007)
 - i) Workgroup on small practices, subgroup on business practices
 - ii) Workgroup on small practices, subgroup on lab connectivity
 - iii) Workgroup on small practices, subgroup on financing
 - iv) Workgroup on Practice Transformation (2006)
 - v) Presentation at the Health Information Summit West: “Evaluating EHR Functionality at the Point of Care” (March 7, 2005)
 - vi) Presentation at the Health Information Summit 3: “Healthcare Quality and HIT at the Crossroads: The Electronic Physicians’ H&P” (September 2006)
 - vii) Presentation at the Health Information Summit 4: “Achieving Compliance, Efficiency, and Quality Care with Future EHRs” (panel with Robin Linker CPC & Michael Barr, MD; March 30 2007)
 - viii) Presentation at the Health Information Summit 4: “Workforce Needs for Physicians’ Health Information Transformation” (March 30 2007)
 - b) Attendance at 2005 Unified Health Alliance Conference, sponsored by The Center for Practical Health Reform
 - c) Attendance at “Health Information Technology Summits”: September 2004, March 2005, September 2005, September 2006, March 2007
 - d) Executive Consultant with “Healthy Ocala” (Greater Ocala Health Information Trust, Inc.), regional health information exchange integrating electronic and non-electronic medical records
2008 – present

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4) Physician Referral Guidelines:

- a) Concept developed and advanced February, 1993
- b) Presented to American Academy of Otolaryngology - Head and Neck Surgery in March, 1993; adopted as official program by AAO-HNS in September, 1993; published guidelines planned in September, 1995
- c) Presented to American Medical Association's Practice Parameters Forum in June, 1993; endorsed by AMA 1995
- d) Task force writing specialty referral guidelines for AAO-HNS, 1993 - 1995
- e) Consultation on Otolaryngology specialty referral guidelines for CappCare, 1993 - 1995
- f) Also considers the complementary concepts of Preventive Care Guidelines and Patient Self-Care Guidelines