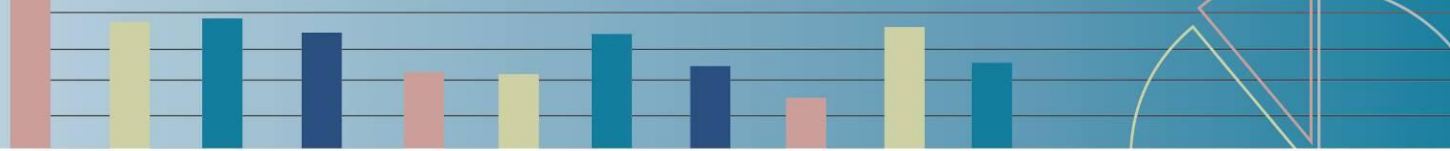


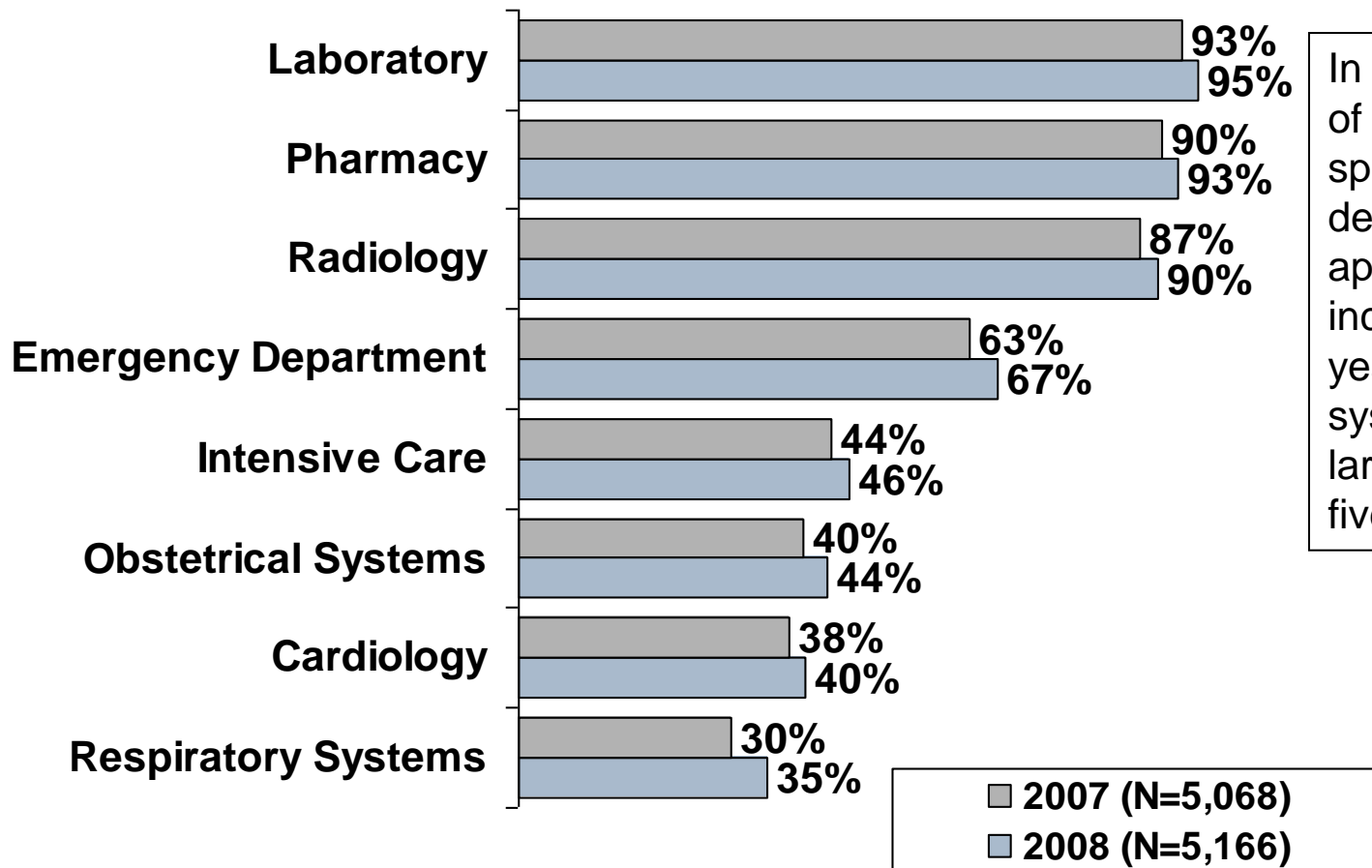
MARKET OVERVIEW

Ancillary/Clinical Departmental Applications 2008 Year End Report

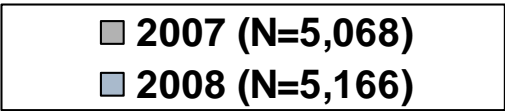


Departmental Applications

Summary of Installation (2007/2008)

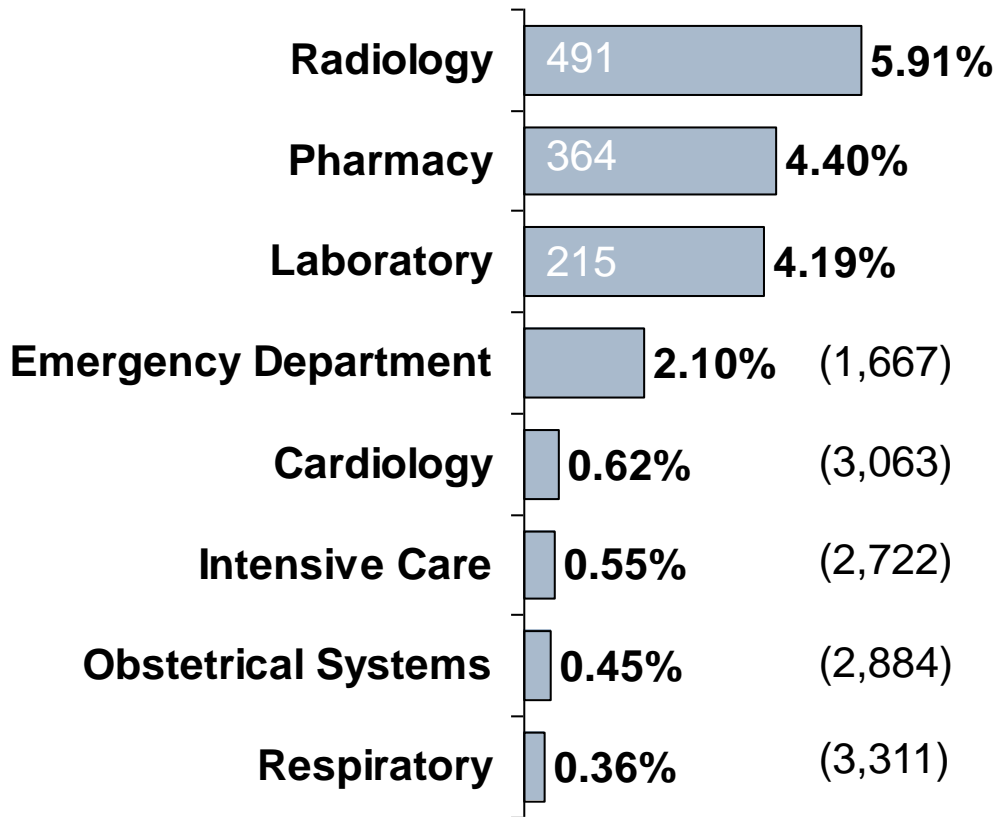


In general, the percent of hospitals using specialized departmental applications has increased in the past year. Respiratory systems showed the largest growth rate, at five percent.



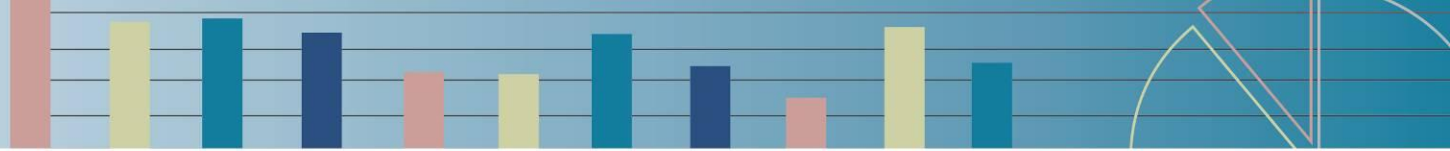
Departmental Applications

Summary of Plans (in “Not Automated” Hospitals)



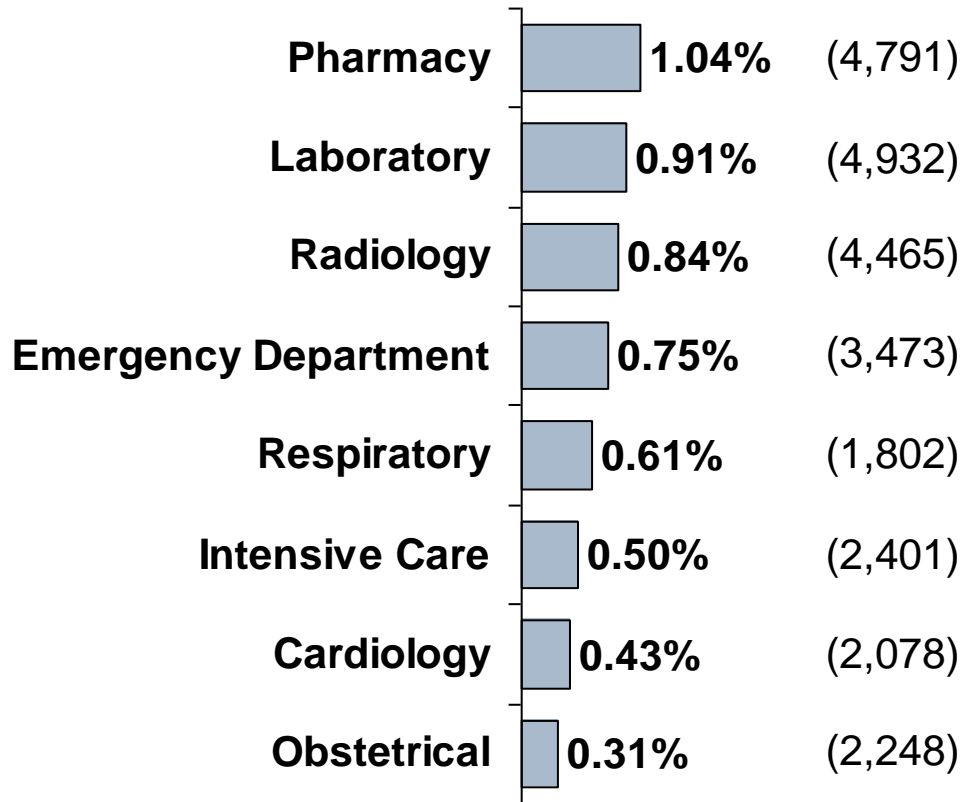
By volume, emergency department (ED), radiology and cardiology software will be most widely purchased among hospitals that currently do not have these applications. The lowest market activity is for obstetrical systems (OB), respiratory and laboratory.

Numbers in white and parentheses represents number of not automated hospitals.



Departmental Applications

Summary of Plans (Replacing Current Software)

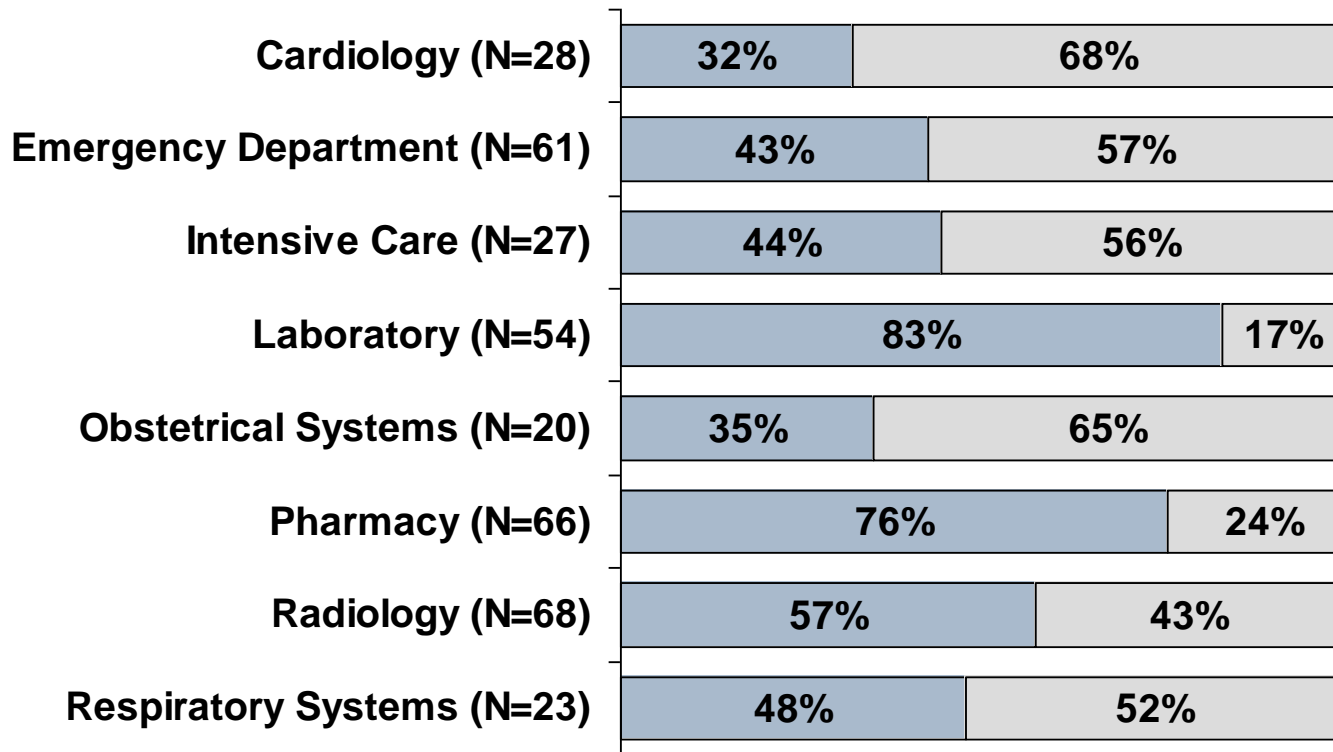


By percent, hospitals are most likely to replace their existing pharmacy, laboratory and radiology software. There will be limited replacement activity in all the other areas.

Numbers in parentheses represent number of hospitals with installed or contracted systems

Departmental Applications

Summary of First Time Purchase & Replace



Percent of Hospitals with Installed Software - Replacing
 Percent of Hospitals Planning to Purchase Software for the First Time

The laboratory and pharmacy markets are predominantly replacement markets. Radiology, ED, ICU and respiratory represent markets in which there is almost an even proportion of new and replacement purchases. For cardiology and OB the majority of their planned purchases will be new purchases.



Summary of Installations

- 633 of 5,166 hospitals in 2008 (or 12 percent) have installed software or signed a contract in all applications areas identified in this report.
 - 110 hospitals (approximately 2 percent) do not use software in any of the eight applications areas.
- 4,487 hospitals (87 percent) have installed software or signed a contract for laboratory, radiology and pharmacy systems.
- Another 410 hospitals (8 percent) have installed software or signed a contract in all application areas except respiratory care.



Cardiology

Top 10 Installed and Contracted Systems

Vendor	# of Installations	% of Market
GE HEALTHCARE	453	22.64%
MEDITECH	347	17.34%
PHILIPS MEDICAL SYSTEMS	334	16.69%
MCKESSON PROVIDER TECHNOLOGIES	166	8.30%
SIEMENS MEDICAL SOLUTIONS	131	6.55%
CERNER CORPORATION	110	5.50%
AGFA-GEVAERT GROUP	106	5.30%
LUMEDX CORPORATION	91	4.55%
EMAGEON	71	3.55%
CPSI	43	2.15%



Emergency Department

Top 10 Installed and Contracted Systems

Vendor	# of Installations	% of Market
MEDITECH	826	24.05%
CERNER CORPORATION	423	12.32%
MCKESSON PROVIDER TECHNOLOGIES	319	9.29%
CPSI	232	6.76%
EPIC SYSTEMS CORP.	223	6.49%
PICIS	220	6.41%
PRO-MED CLINICAL SYSTEM	166	4.83%
T-SYSTEM	134	3.90%
HEALTHLAND	115	3.35%
ALLSCRIPTS HEALTHCARE SOLUTIONS	114	3.32%

N = 3434

Source: HIMSS Analytics™ Database



Intensive Care

Top 10 Installed and Contracted Systems

Vendor	# of Installations	% of Market
MEDITECH	685	28.83%
CERNER CORPORATION	363	15.28%
MCKESSON PROVIDER TECHNOLOGIES	312	13.13%
EPIC SYSTEMS CORP.	165	6.94%
SIEMENS MEDICAL SOLUTIONS	156	6.57%
PHILIPS MEDICAL SYSTEMS	141	5.93%
CPSI	140	5.89%
ECLIPSYS CORPORATION	117	4.92%
SELF-DEVELOPED	95	4.00%
GE HEALTHCARE	78	3.28%

N = 2376

Source: HIMSS Analytics™ Database



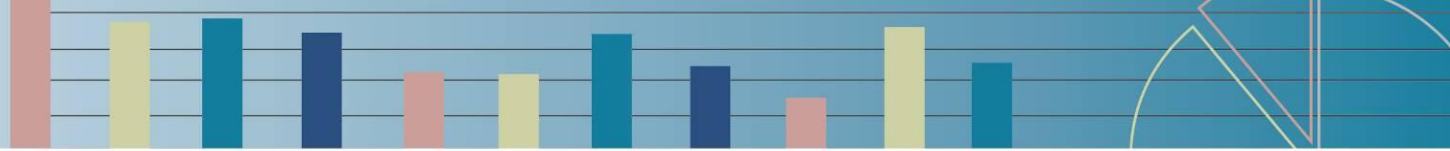
Laboratory

Top 10 Installed and Contracted Systems

Vendor	# of Installations	% of Market
MEDITECH	1,157	24.15%
SUNQUEST INFORMATION SYSTEMS	716	14.95%
CERNER CORPORATION	702	14.66%
SCC SOFT COMPUTER	398	8.31%
CPSI	347	7.24%
MCKESSON PROVIDER TECHNOLOGIES	338	7.06%
HEALTHCARE MANAGEMENT SYSTEMS, INC.	205	4.28%
HEALTHLAND	159	3.32%
ORCHARD SOFTWARE CORP.	111	2.32%
FLETCHER-FLORA, INC.	85	1.77%

N = 4790

Source: HIMSS Analytics™ Database



Obstetrical Systems

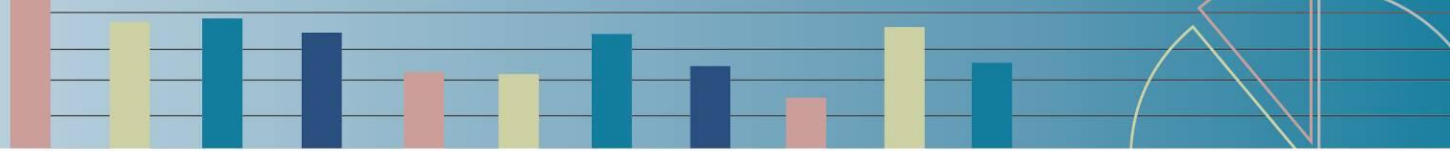
Top 10 Installed and Contracted Systems

Vendor	# of Installations	% of Market
GE HEALTHCARE	809	36.66%
PHILIPS MEDICAL SYSTEMS	331	15.00%
MEDITECH	258	11.69%
HILL-ROM CO., INC.	186	8.43%
CERNER CORPORATION	103	4.67%
EPIC SYSTEMS CORP.	99	4.49%
CPSI	89	4.03%
MCKESSON PROVIDER TECHNOLOGIES	89	4.06%
CLINICAL COMPUTER SYSTEMS, INC.	85	3.85%
E&C MEDICAL INTELLIGENCE	32	1.45%

N = 2207

Source: HIMSS Analytics™ Database

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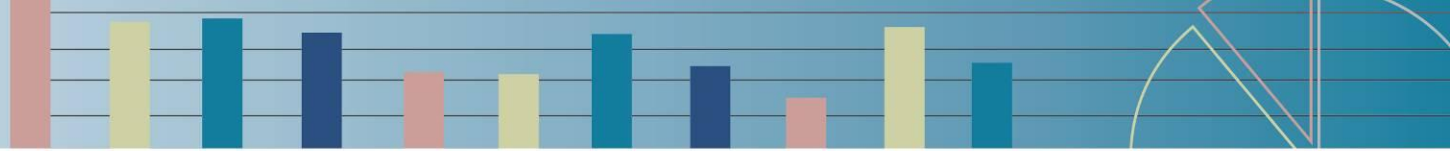
Pharmacy Management Systems

Top 10 Installed and Contracted Systems

Vendor	# of Installations	% of Market
MEDITECH	1,162	24.54%
MCKESSON PROVIDER TECHNOLOGIES	730	15.41%
CERNER CORPORATION	606	12.80%
CPSI	371	7.83%
HEALTHCARE MANAGEMENT SYSTEMS, INC.	295	6.23%
SIEMENS MEDICAL SOLUTIONS	282	5.95%
EPIC SYSTEMS CORP.	191	4.03%
HEALTHLAND	178	3.76%
GE HEALTHCARE	172	3.63%
CROWN SOFTWARE, INC.	104	2.20%

N = 4736

Source: HIMSS Analytics™ Database



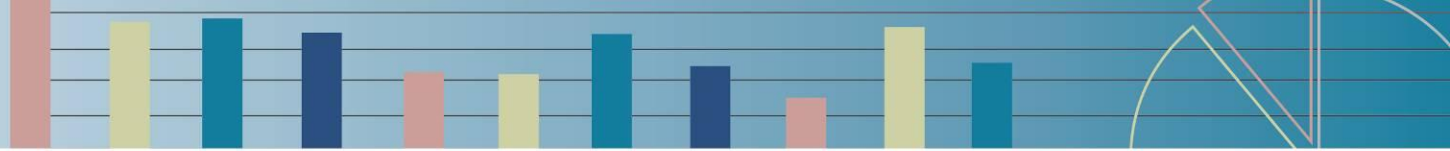
Radiology Information Systems

Top 10 Installed and Contracted Systems

Vendor	# of Installations	% of Market
MEDITECH	1,101	24.37%
CERNER CORPORATION	596	13.19%
GE HEALTHCARE	541	11.98%
MCKESSON PROVIDER TECHNOLOGIES	501	11.09%
SIEMENS MEDICAL SOLUTIONS	392	8.68%
CPSI	342	7.57%
HEALTHCARE MANAGEMENT SYSTEMS, INC.	217	4.80%
HEALHTLAND	177	3.92%
EPIC SYSTEMS CORP.	123	2.72%
SUNQUEST INFORMATION SYSTEMS	76	1.68%

N = 4517

Source: HIMSS Analytics™ Database



Respiratory

Top 10 Installed and Contracted Systems

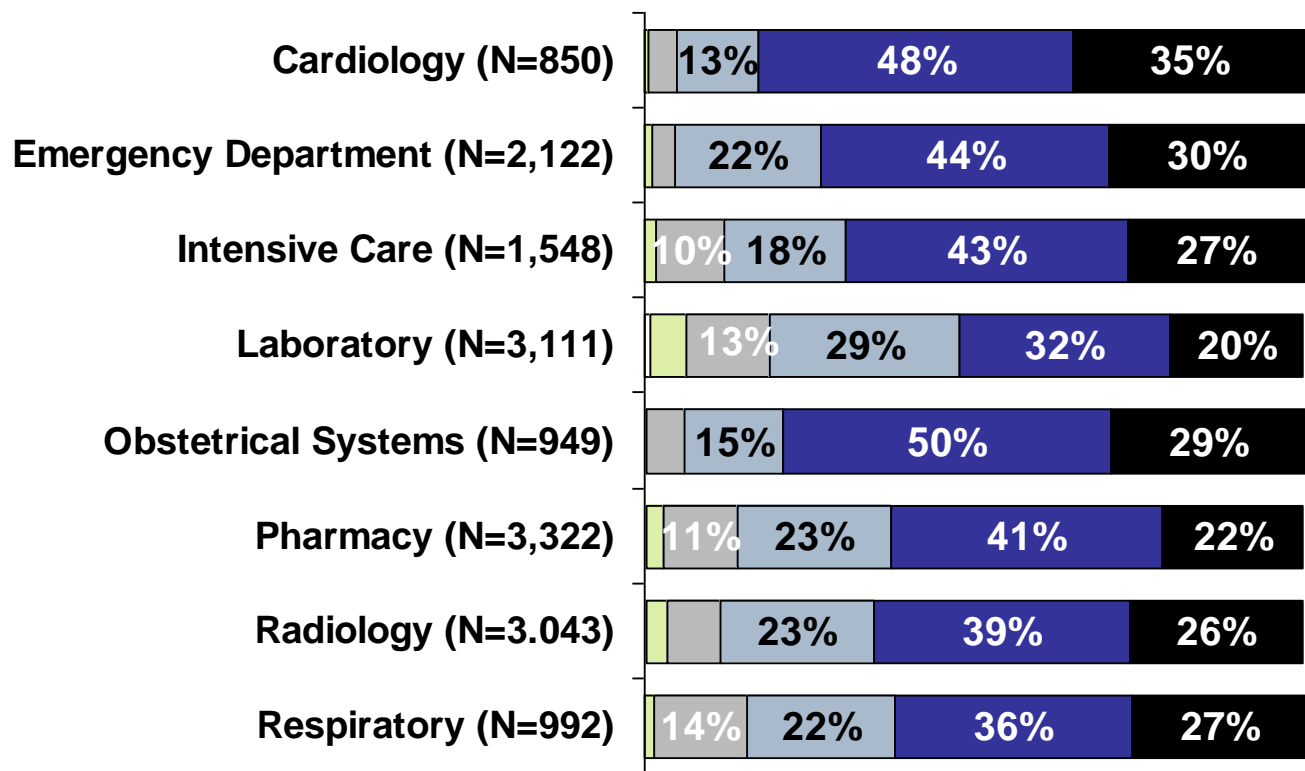
Vendor	# of Installations	% of Market
MEDITECH	597	34.15%
CERNER CORPORATION	266	15.22%
MCKESSON PROVIDER TECHNOLOGIES	202	11.56%
CPSI	150	8.58%
SELF-DEVELOPED	106	6.06%
EPIC SYSTEMS CORP.	88	5.03%
MEDISERVE INFORMATION SYSTEMS, INC.	75	4.29%
SIEMENS MEDICAL SOLUTIONS	62	3.55%
MALLINCKRODT, INC.	60	3.43%
HEALTHLAND	45	2.57%

N = 1748

Source: HIMSS Analytics™ Database

Departmental Applications

Temporal Summary of Installation



Cardiology, ED and obstetrical systems have about three quarters of the contracts having been signed after 1990. The other departments have over half of the contracts signed in this same timeframe with laboratory having the largest number of older contracts.





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