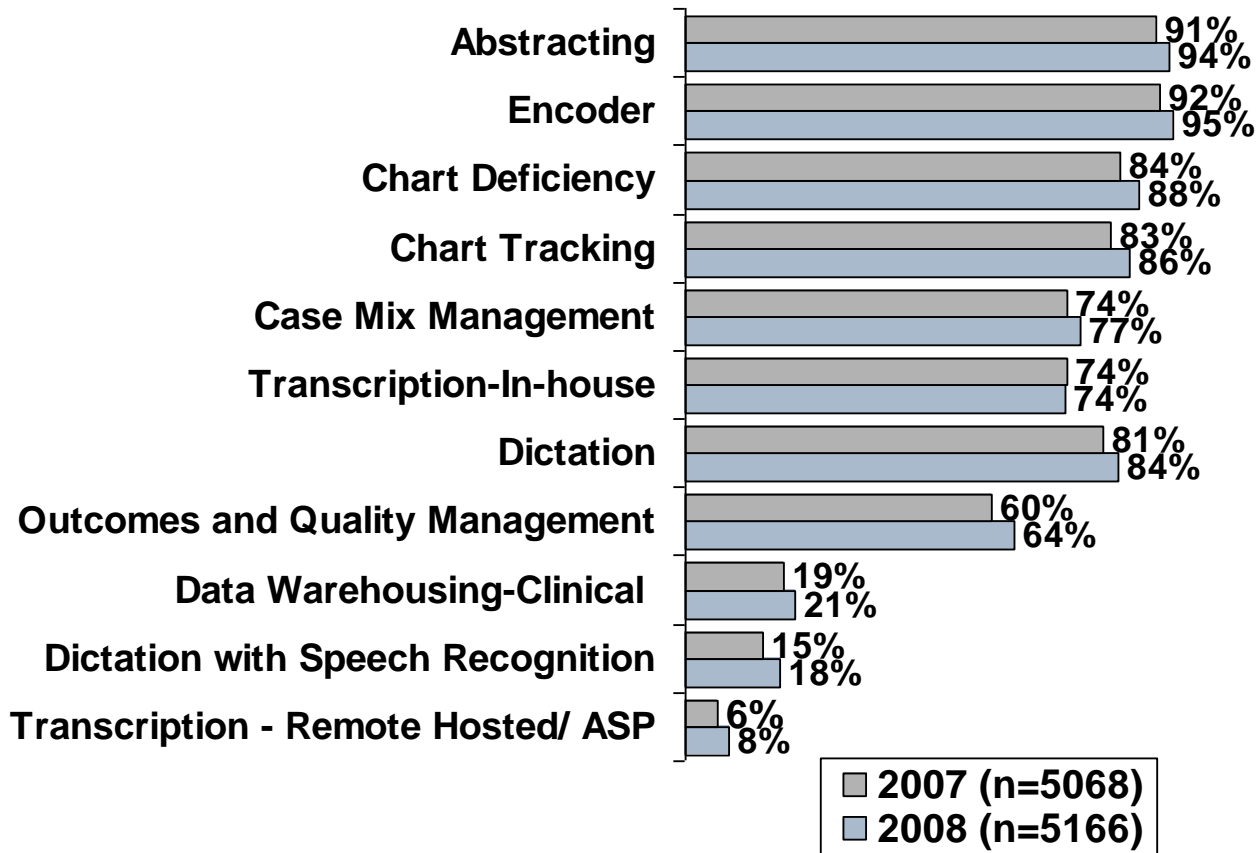
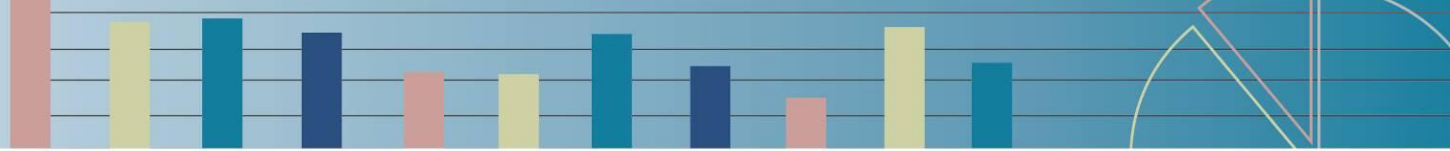


# HIM Applications

## Summary of Installation Rate (2007/2008)

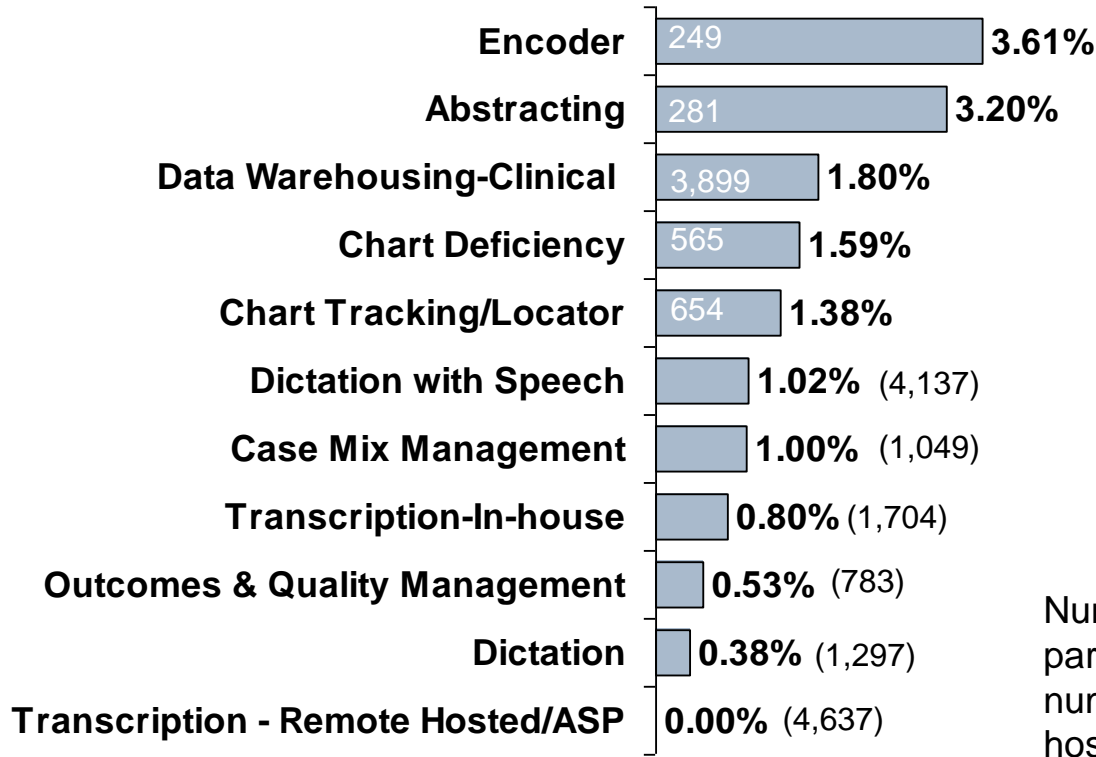


The installation rate, which includes both installed and contracted systems for all HIM applications increased from 2007 to 2008 except for in-house transcription. Abstracting and encoder are the only two HIM applications to have achieved near market saturation.



# HIM Applications

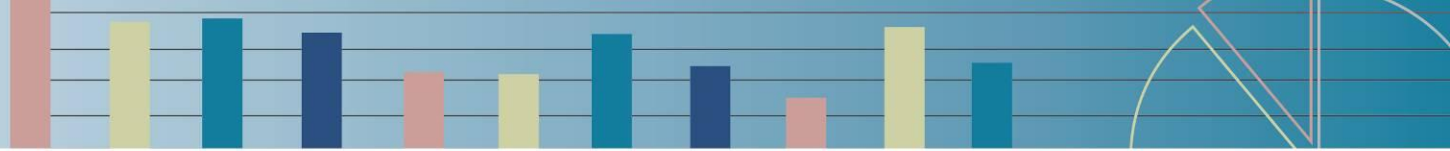
## Summary of Plans (in “Not Automated” Hospitals)



By volume, data warehousing – clinical and dictation with speech recognition will have the highest margin of new purchases.

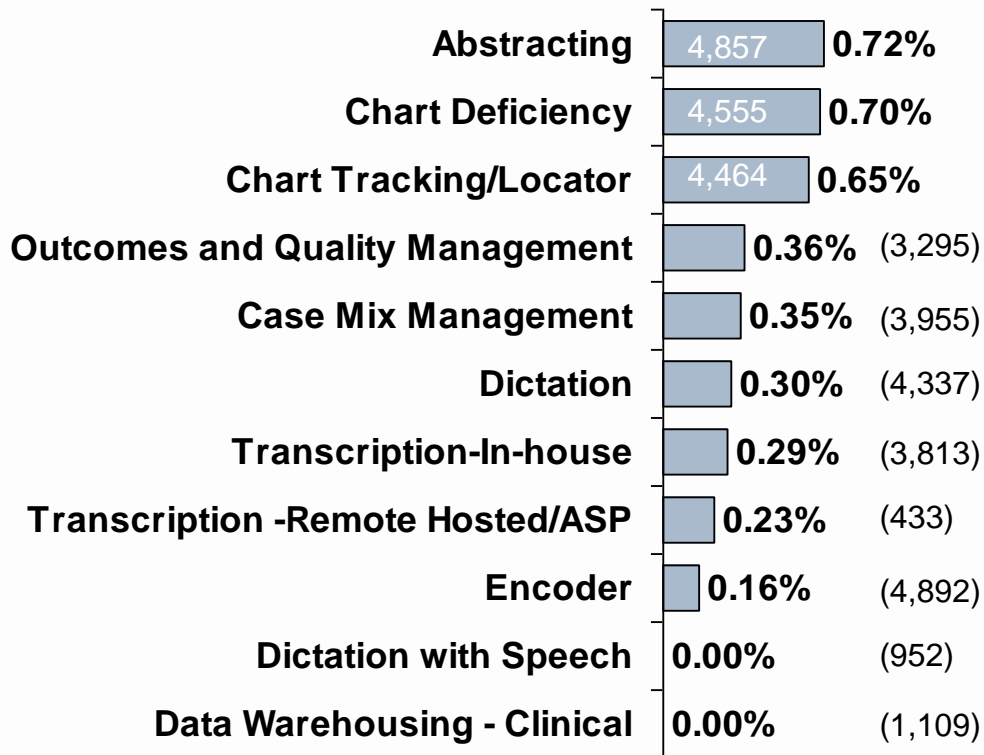
Numbers in white and parentheses represents number of not automated hospitals.

■ Percent of "Not Automated" Hospitals Planning to Purchase Software



# HIM Applications

## Summary of Plans (Replacing Current Software)



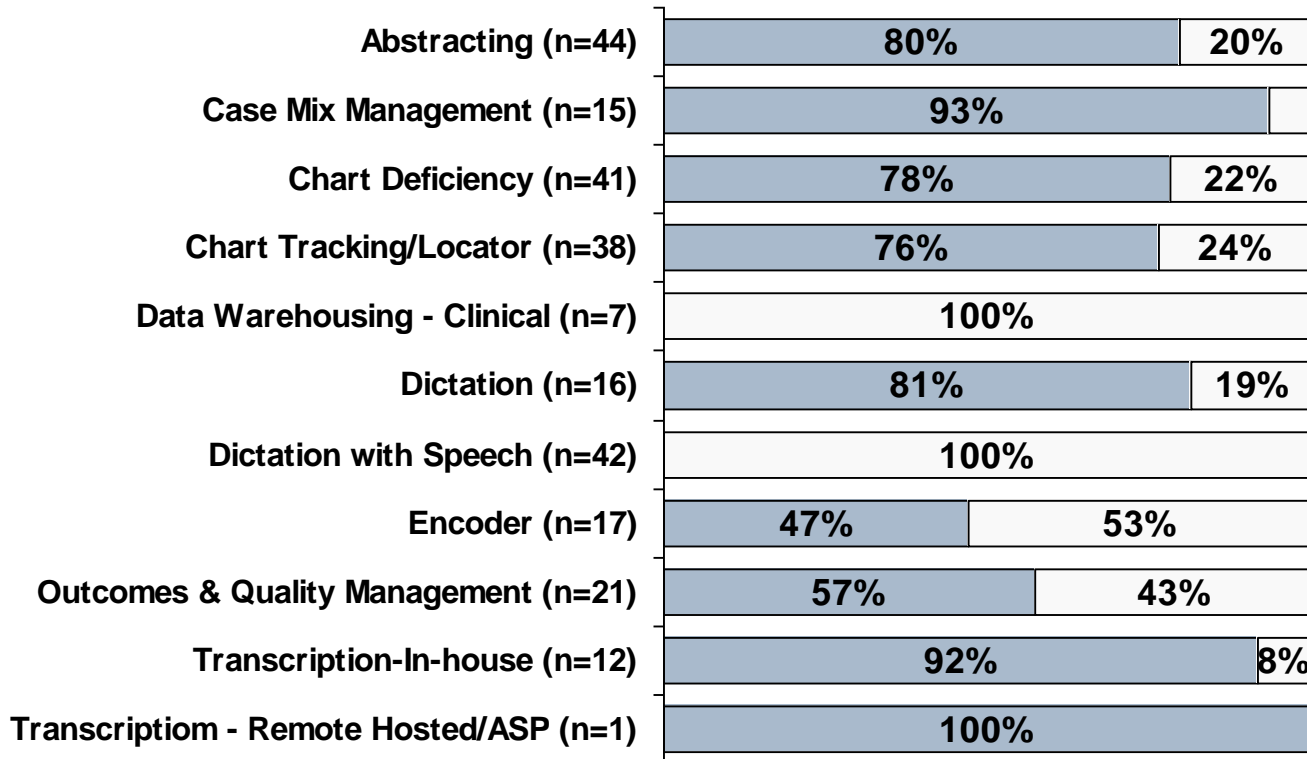
Replacement activities for HIM applications are low. By percent and volume, chart deficiency, chart tracking and abstracting are projected to have the largest replacement rate. No hospitals plan to replace dictation with speech or clinical data warehousing software.

Numbers in white and parentheses represents number of hospitals with installed and/or contracted solutions.

■ Percent of Hospitals with Installed or Contracted Systems Planning to Purchase Software

# HIM Applications

## Summary of Plans



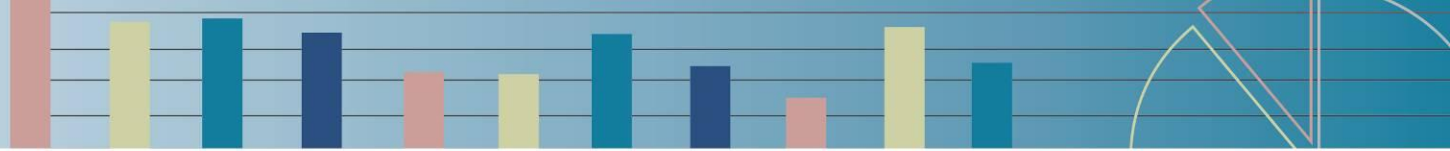
The majority of purchases for HIM applications will be among hospitals that are replacing current software. All purchases for data warehousing – clinical and dictation with speech recognition are expected to be first time purchases.

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



## Summary of Installations

- Of the 5,166 hospitals, less than one percent (33) of hospitals have installed or planning to install all 11 HIM applications.
  - In all 11 cases, different vendors are employed across the different HIM applications.
- About six percent of the hospitals indicate that they have installed or will be installing 10 health information management applications.
  - Again, different vendors are employed across the different HIM applications.
- 1,023 (20 percent of hospitals) have installed software or have signed a contract in 9 health information management applications.
  - Two of the 1,023 hospitals are using only one vendor for all 9 applications.
- Less than one percent (48) of the hospitals do not have any of the HIM applications installed.



# Abstracting

## Top Ten Installed or Contracted Systems

Vendor	# of Installations	% of Market*
<b>MEDITECH</b>	1218	25.19%
<b>3M HEALTH INFORMATION SYSTEMS</b>	673	13.92%
<b>MCKESSON PROVIDER TECHNOLOGIES</b>	611	12.64%
<b>CPSI</b>	372	7.69%
<b>SIEMENS MEDICAL SOLUTIONS</b>	324	6.70%
<b>HEALTHCARE MANAGEMENT SYSTEMS, INC.</b>	317	6.56%
<b>HEALTHLAND</b>	286	5.92%
<b>CERNER CORPORATION</b>	266	5.50%
<b>QUADRAMED CORP.</b>	173	3.58%
<b>EPIC SYSTEMS CORP.</b>	143	2.96%

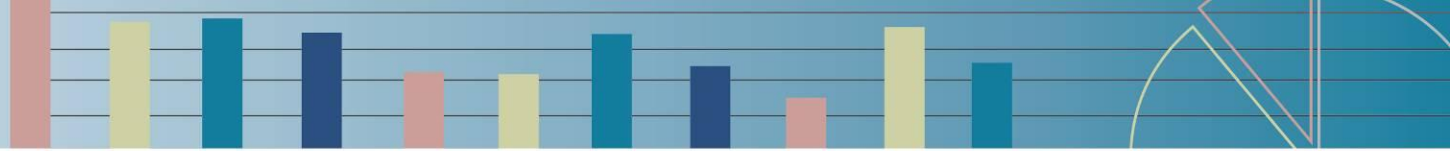
34 Vendors share the remaining 9.70% of the market.

\* The total percentage may exceed 100 percent due to rounding or some organization may have more than one vendor installed.

N = 4835

Source: HIMSS Analytics™ Database

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# Case Mix Management

## Top Ten Installed or Contracted Systems

Vendor	# of Installations	% of Market*
<b>MEDITECH</b>	901	22.96%
<b>MCKESSON PROVIDER TECHNOLOGIES</b>	597	15.21%
<b>SIEMENS MEDICAL SOLUTIONS</b>	407	10.37%
<b>SELF-DEVELOPED</b>	328	8.36%
<b>CPSI</b>	258	6.57%
<b>HEALTHCARE MANAGEMENT SYSTEMS, INC.</b>	258	6.57%
<b>HEALTHLAND</b>	180	4.59%
<b>ECLIPSYS CORPORATION</b>	175	4.46%
<b>ACS HEALTHCARE SOLUTIONS</b>	167	4.26%
<b>CERNER CORPORATION</b>	102	2.60%

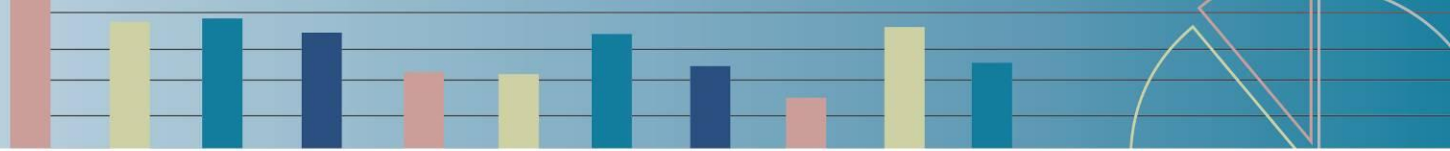
48 Vendors share the remaining 14.53% of the market.

\* The total percentage may exceed 100 percent due to rounding or some organization may have more than one vendor installed.

N = 3924

Source: HIMSS Analytics™ Database

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# Chart Deficiency

## Top Ten Installed or Contracted Systems

Vendor	# of Installations	% of Market*
<b>MEDITECH</b>	1145	25.25%
<b>3M HEALTH INFORMATION SYSTEMS</b>	611	13.48%
<b>MCKESSON PROVIDER TECHNOLOGIES</b>	548	12.09%
<b>CERNER CORPORATION</b>	370	8.16%
<b>CPSI</b>	349	7.70%
<b>HEALTHCARE MANAGEMENT SYSTEMS, INC.</b>	301	6.64%
<b>HEALTHLAND</b>	197	4.34%
<b>SIEMENS MEDICAL SOLUTIONS</b>	188	4.15%
<b>EPIC SYSTEMS CORP.</b>	167	3.68%
<b>QUADRAMED CORP.</b>	121	2.67%

38 Vendors share the remaining 12.02% of the market.

\* The total percentage may exceed 100 percent due to rounding or some organization may have more than one vendor installed.

N = 4534

Source: HIMSS Analytics™ Database

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# Chart Tracking

## Top Ten Installed or Contracted Systems

Vendor	# of Installations	% of Market*
<b>MEDITECH</b>	1138	25.60%
<b>3M HEALTH INFORMATION SYSTEMS</b>	671	15.10%
<b>MCKESSON PROVIDER TECHNOLOGIES</b>	526	11.83%
<b>CERNER CORPORATION</b>	362	8.14%
<b>CPSI</b>	351	7.90%
<b>HEALTHCARE MANAGEMENT SYSTEMS, INC.</b>	292	6.57%
<b>HEALTHALND</b>	184	4.14%
<b>SIEMENS MEDICAL SOLUTIONS</b>	176	3.96%
<b>EPIC SYSTEMS CORP.</b>	156	3.51%
<b>QUADRAMED CORP.</b>	120	2.70%

34 Vendors share the remaining 10.66% of the market.

\* The total percentage may exceed 100 percent due to rounding or some organization may have more than one vendor installed.

N = 4445

Source: HIMSS Analytics™ Database

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# Data Warehouse-Clinical

## Top Ten Installed or Contracted Systems

Vendor	# of Installations	% of Market*
<b>SELF-DEVELOPED</b>	195	18.97%
<b>MEDITECH</b>	157	15.27%
<b>MCKESSON PROVIDER TECHNOLOGIES</b>	122	11.87%
<b>CERNER CORPORATION</b>	104	10.12%
<b>ECLIPSYS CORPORATION</b>	89	8.66%
<b>SIEMENS MEDICAL SOLUTIONS</b>	81	7.88%
<b>CPSI</b>	59	5.74%
<b>EPIC SYSTEMS CORP.</b>	41	3.99%
<b>ACS HEALTHCARE SOLUTIONS</b>	25	2.43%
<b>OPUS HEALTHCARE SOLUTIONS, INC.</b>	23	2.24%

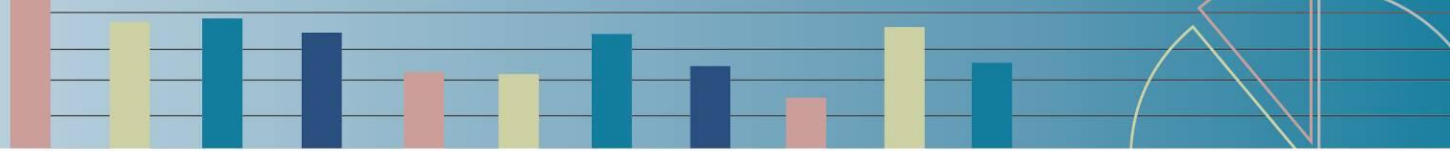
24 Vendors share the remaining 13.04% of the market.

\* The total percentage may exceed 100 percent due to rounding or some organization may have more than one vendor installed.

N = 1028

Source: HIMSS Analytics™ Database

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# Dictation

## Top Ten Installed or Contracted Systems

Vendor	# of Installations	% of Market*
<b>NUANCE COMMUNICATIONS, INC.</b>	1448	35.71%
<b>MEDQUIST</b>	1402	34.57%
<b>3M HEALTH INFORMATION SYSTEMS</b>	233	5.75%
<b>DOLBEY AND COMPANY</b>	219	5.40%
<b>SPHERIS</b>	116	2.86%
<b>WINSCRIBE, INC.</b>	100	2.47%
<b>SELF-DEVELOPED</b>	50	1.23%
<b>MEDQUEST SOFTWARE, INC.</b>	42	1.04%
<b>CRESCENDO SYSTEMS CORPORATION</b>	36	0.89%
<b>VOICE PRODUCTS, INC.</b>	32	0.79%

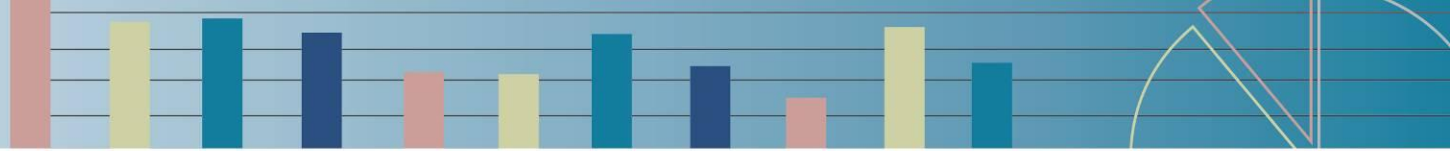
70 Vendors share the remaining 9.64% of the market.

\* The total percentage may exceed 100 percent due to rounding or some organization may have more than one vendor installed.

N = 4055

Source: HIMSS Analytics™ Database

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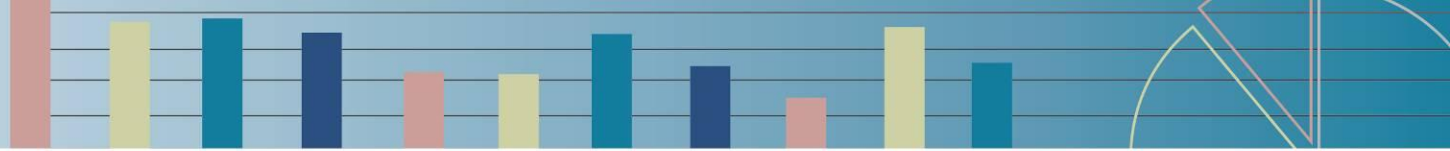


# Dictation w/ Speech

## Top Ten Installed or Contracted Systems

Vendor	# of Installations	% of Market
<b>NUANCE COMMUNICATIONS, INC.</b>	625	67.49%
<b>MEDQUIST</b>	151	16.31%
<b>DOLBEY AND COMPANY</b>	43	4.64%
<b>AGFA-GEVAERT GROUP</b>	33	3.56%
<b>3M HEALTH INFORMATION SYSTEMS</b>	26	2.81%
<b>WINSCRIBE, INC.</b>	9	0.97%
<b>PHILIPS MEDICAL SYSTEMS</b>	6	0.65%
<b>SPHERIS</b>	5	0.54%
<b>PROVOX TECHNOLOGIES CORPORATION</b>	4	0.43%
<b>CRESCENDO SYSTEMS CORPORATION</b>	4	0.43%

11 Vendors share the remaining 2.16% of the market.



# Encoder

## Top Ten Installed or Contracted Systems

Vendor	# of Installations	% of Market*
<b>3M HEALTH INFORMATION SYSTEMS</b>	3658	75.36%
<b>QUADRAMED CORP.</b>	531	10.94%
<b>MEDITECH</b>	133	2.74%
<b>INGENIX</b>	100	2.06%
<b>INNOVATIVE HEALTH SOLUTIONS, LLC</b>	91	1.87%
<b>CPSI</b>	66	1.36%
<b>HEALTHLAND</b>	63	1.30%
<b>CERNER CORPORATION</b>	38	0.78%
<b>HEALTHCARE MANAGEMENT SYSTEMS, INC.</b>	34	0.70%
<b>ACCURO HEALTHCARE SOLUTIONS</b>	29	0.60%
<b>MCKESSON PROVIDER TECHNOLGIES</b>	29	0.60%

27 Vendors share the remaining 2.04% of the market.

\* The total percentage may exceed 100 percent due to rounding or some organization may have more than one vendor installed.

N = 4854

# Outcomes & Quality Mgmt

## Top Ten Installed or Contracted Systems

Vendor	# of Installations	% of Market*
<b>MEDITECH</b>	562	17.27%
<b>ACS HEALTHCARE SOLUTIONS</b>	453	13.92%
<b>SELF-DEVELOPED</b>	344	10.57%
<b>MCKESSON PROVIDER TECHNOLOGIES</b>	291	8.94%
<b>HEALTHCARE MANAGEMENT SYSTEMS, INC.</b>	230	7.07%
<b>CPSI</b>	181	5.56%
<b>SIEMENS MEDICAL SOLUTIONS</b>	147	4.52%
<b>PREMIER, INC.</b>	105	3.23%
<b>HEALTHLAND</b>	93	2.86%
<b>CERNER CORPORATION</b>	93	2.86%

64 Vendors share the remaining 24.79% of the market.

\* The total percentage may exceed 100 percent due to rounding or some organization may have more than one vendor installed.

N = 3255

Source: HIMSS Analytics™ Database

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# Transcription - In-house

## Top Ten Installed or Contracted Systems

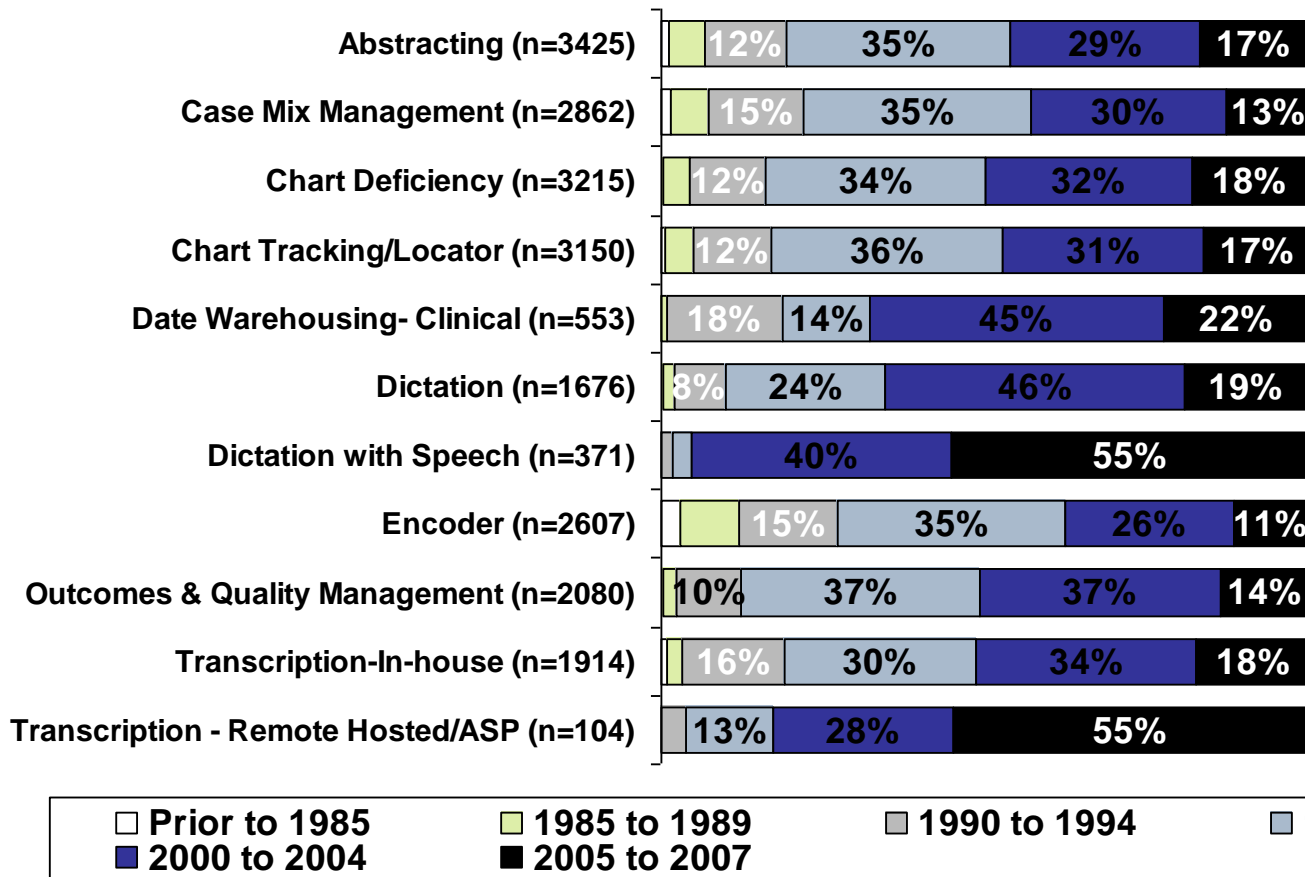
Vendor	# of Installations	% of Market*
<b>NUANCE COMMUNICATIONS, INC.</b>	853	22.74%
<b>MEDQUIST</b>	743	19.81%
<b>3M HEALTH INFORMATION SYSTEMS</b>	547	14.58%
<b>MEDITECH</b>	311	8.29%
<b>CPSI</b>	235	6.26%
<b>DOLBEY AND COMPANY</b>	170	4.53%
<b>HEALTHLAND</b>	109	2.91%
<b>HEALTHCARE MANAGEMENT SYSTEMS, INC.</b>	82	2.19%
<b>SPHERIS</b>	76	2.03%
<b>SELF-DEVELOPED</b>	56	1.49%

58 Vendors share the remaining 15.81% of the market.

\* The total percentage may exceed 100 percent due to rounding or some organization may have more than one vendor installed.

# HIM Applications

## Temporal Summary of Installation



More than half of the contracts for dictation with speech recognition and remote hosted transcription software systems have taken place since 2005. Contract signing for all applications in this report has been strong since 2000.



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