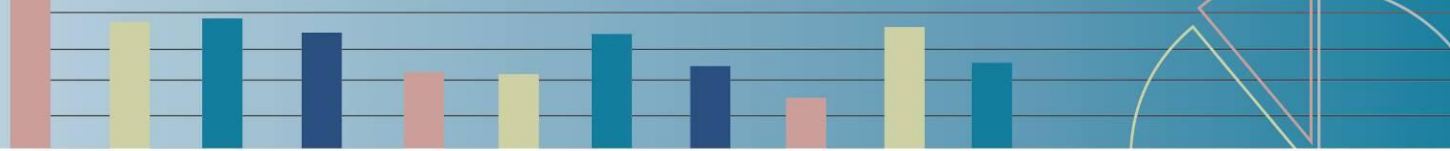


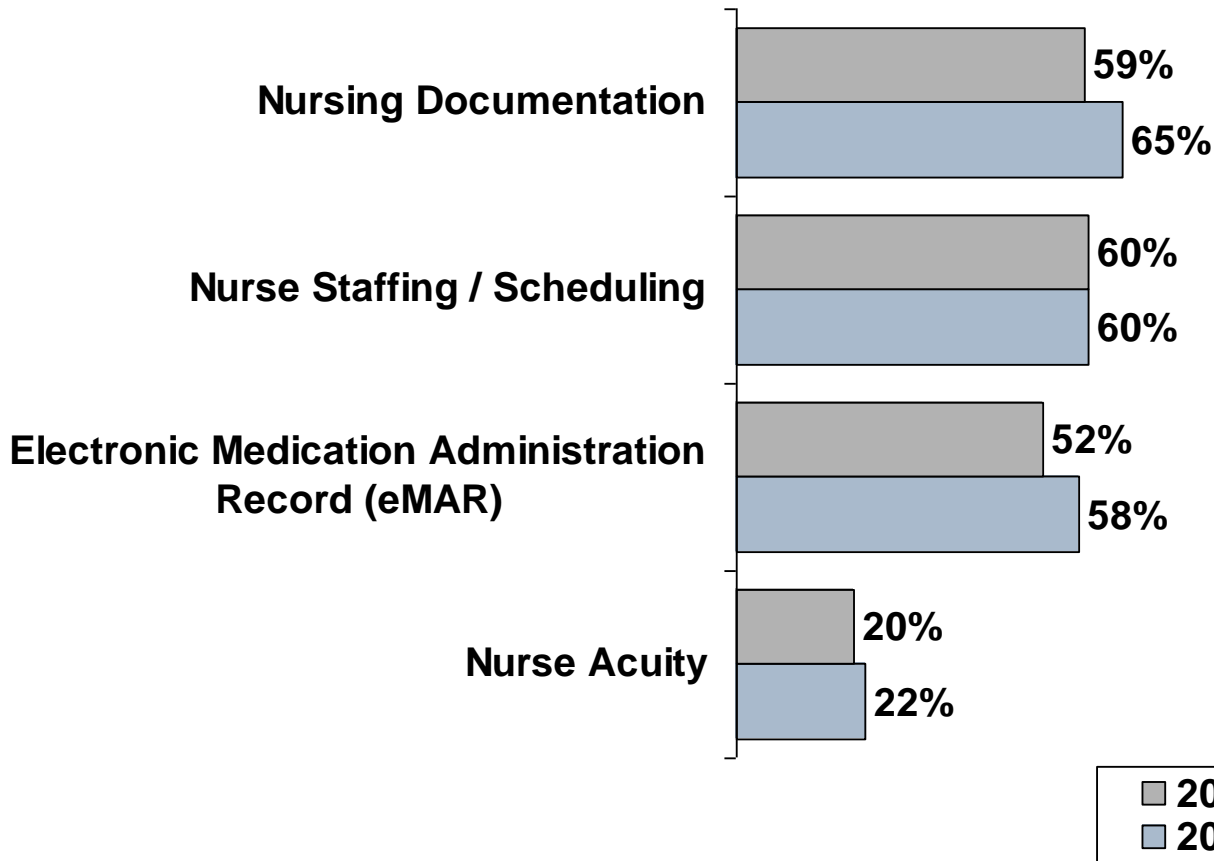
MARKET OVERVIEW

Hospital Nursing Applications 2008 Year End Report



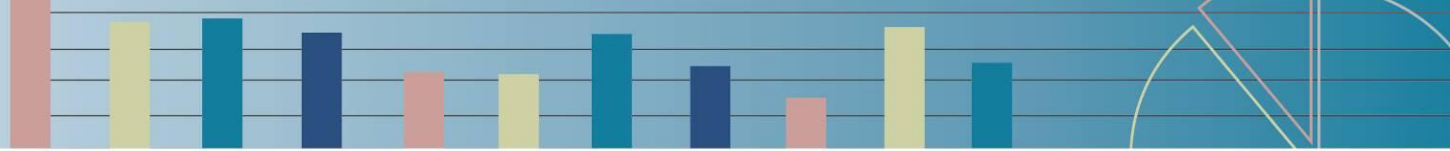
Nursing Applications

Summary of Installation (2007/2008)*



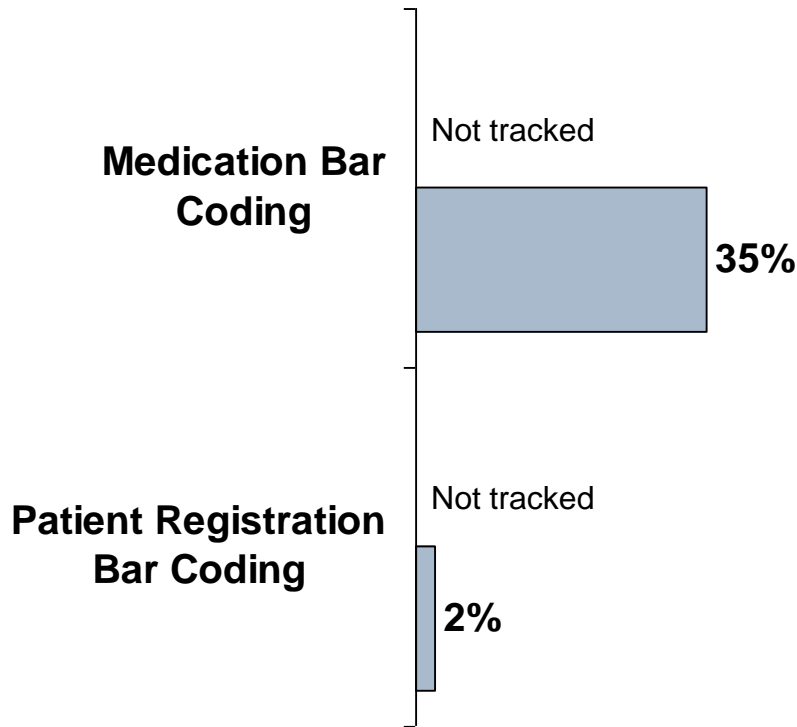
In general, the nursing application installation rates (which includes planned installation) have increased from 2007 to 2008. In particular, nursing documentation and eMAR showed the largest increase while nurse staffing/scheduling has remained relative the same from the previous year.

* Reflects hospitals based only in the US

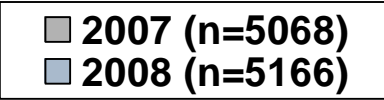


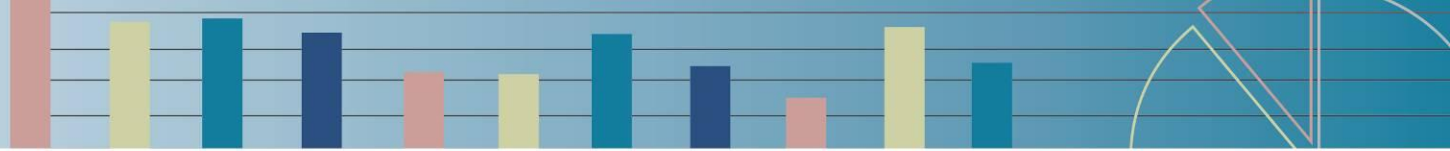
Bar Coding for Nursing

Summary of Implementation (2007/2008)



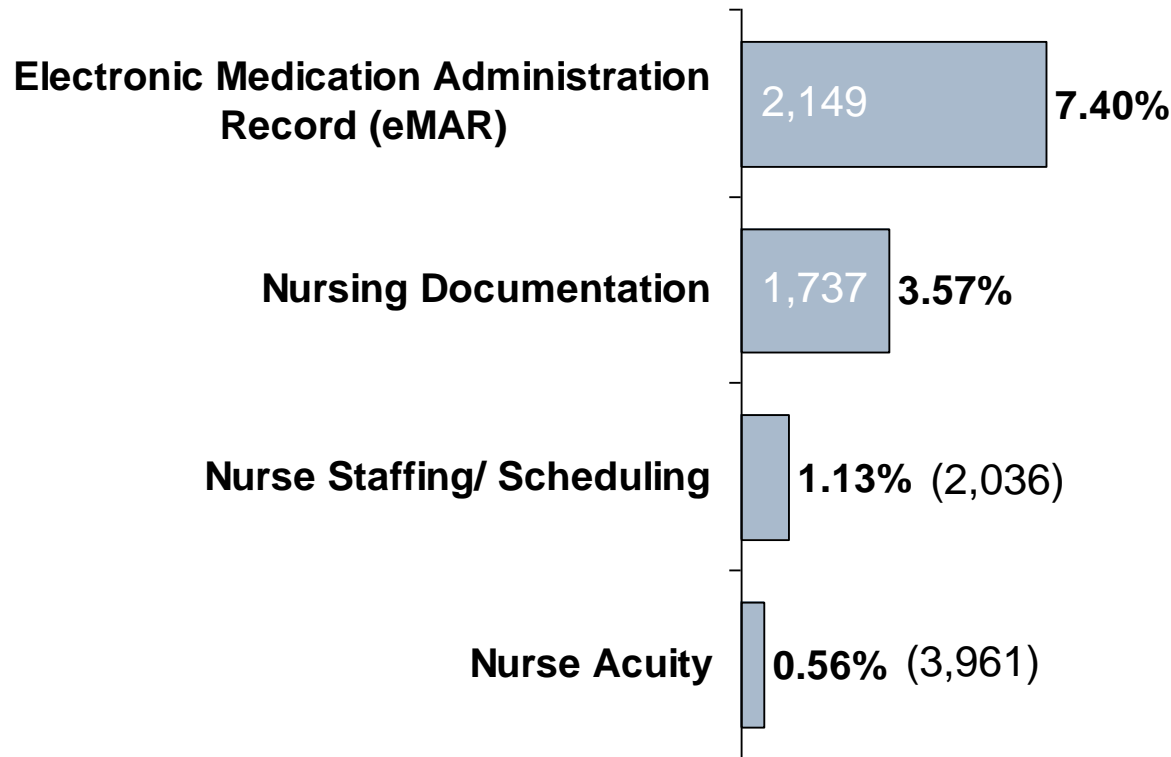
More than one-third of the hospitals have implemented medication bar coding at their facilities. Only two percent use bar coding for patient registration.





Nursing Applications

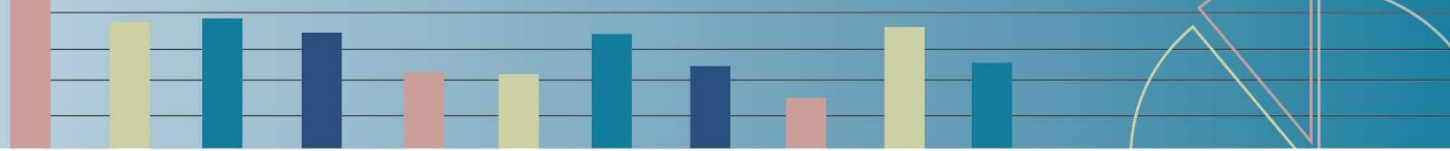
Summary of Plans (in “Not Automated” Hospitals)



More than seven percent of hospitals that don't currently use eMAR software plan to purchase it in the future. Three percent of hospitals that do not have nurse documentation software are planning to purchase.

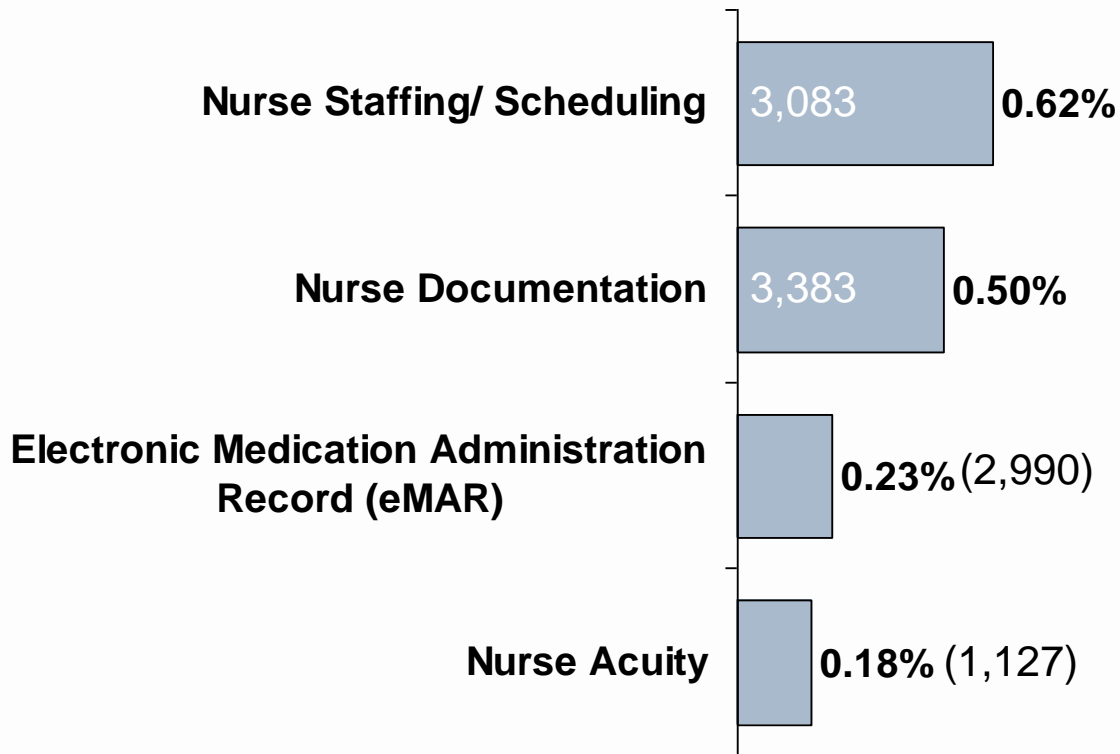
Number in white and parentheses represents number of “not automated” hospitals.

■ Percent of “Not Automated” Hospitals Planning to Purchase Software



Nursing Applications

Summary of Plans (Replacing Current Software)

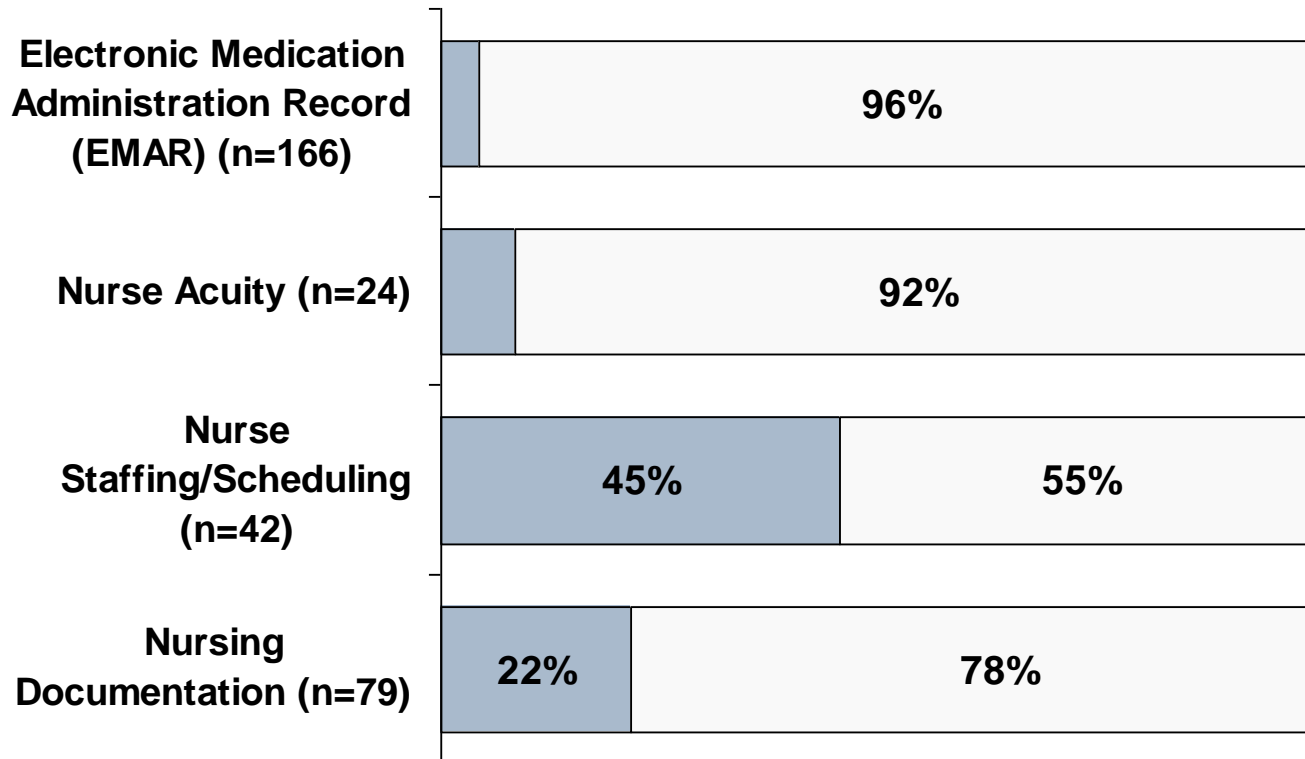


Hospitals, in general, are not likely to replace their existing nursing applications. Nurse staffing/scheduling and nurse documentation are the nursing applications most likely to be replaced.

Number in white and parenthesis represents number of “not automated” hospitals.

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

Nursing Applications Summary of Plans



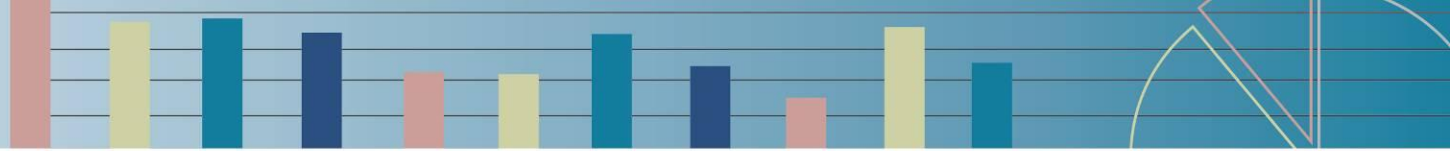
The majority of purchases for nursing applications will be first time purchases. The exception is nurse staffing/scheduling, which is as much a replacement market as a market where first time purchases are being made.

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



Summary of Installation

- More than one in ten hospitals (15 percent or 756 hospitals) have all four nursing applications (eMAR, nurse acuity, nurse staffing/scheduling and nursing documentation) installed or contracted to install.
 - Of the 756 hospitals that have installed or signed a contract to install four nursing IT applications, slightly less than one third of these hospitals (30 percent) are using the same vendor.
 - MEDITECH, Cerner and McKesson are mentioned most often as a single vendor for all four nursing applications.
- Almost half (45 percent) of the hospitals have contracted or installed at least three different nursing applications.



eMAR

Top 10 Installed and Contracted Systems

Vendor	# of Installations	% of Market*
MEDITECH	775	26.09%
CERNER CORPORATION	539	18.14%
MCKESSON PROVIDER TECHNOLOGIES	430	14.47%
EPIC SYSTEMS CORP.	223	7.51%
SIEMENS MEDICAL SOLUTIONS	221	7.44%
CPSI	181	6.09%
ECLIPSYS CORPORATION	142	4.78%
GE HEALTHCARE	106	3.57%
SELF-DEVELOPED	103	3.47%
HEALTHLAND	67	2.26%

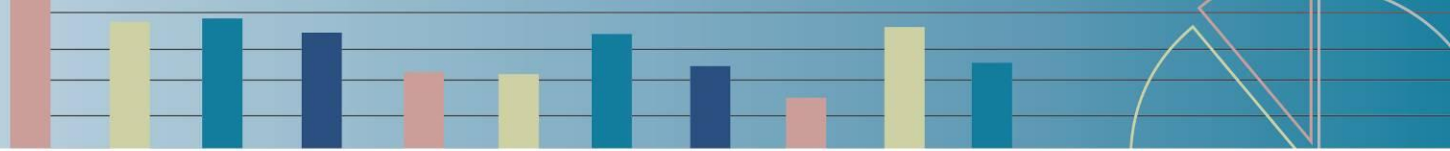
21 Vendors share the remaining 6.23% of the market.

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

N = 2971

Source: HIMSS Analytics™ Database

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Nurse Acuity

Top 10 Installed and Contracted Systems

Vendor	# of Installations	% of Market
MEDITECH	197	18.04%
MCKESSON PROVIDER TECHNOLOGIES	161	14.74%
SELF-DEVELOPED	138	12.64%
CERNER CORPORATION	108	9.89%
QUADRAMED CORP.	104	9.52%
EPIC SYSTEMS CORP.	96	8.79%
OPTILINK HEALTHCARE MANAGEMENT SYSTEMS	79	7.23%
CPSI	55	5.04%
ECLIPSYS CORPORATION	29	2.66%
SIEMENS MEDICAL SOLUTIONS	22	2.01%

19 Vendors share the remaining 9.43% of the market.



Nurse Staffing/Scheduling

Top 10 Installed and Contracted Systems

Vendor	# of Installations	% of Market*
MCKESSON PROVIDER TECHNOLOGIES	1164	38.10%
MEDITECH	390	12.77%
KRONOS, INC.	278	9.10%
API SOFTWARE, INC.	164	5.37%
RES-Q HEALTHCARE SYSTEMS	123	4.03%
CERNER CORPORATION	122	3.99%
CPSI	112	3.67%
ATSTAFF, INC.	89	2.91%
OPTILINK HEALTHCARE MANAGEMENT SYSTEMS	78	2.55%
HEALTHCARE MANAGEMENT SYSTEMS, INC.	62	2.03%

36 Vendors share the remaining 15.58% of the market.

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

N = 3055

Source: HIMSS Analytics™ Database

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Nursing Documentation

Top 10 Installed and Contracted Systems

Vendor	# of Installations	% of Market*
MEDITECH	952	28.40%
CERNER CORPORATION	489	14.59%
MCKESSON PROVIDER TECHNOLOGIES	399	11.90%
CPSI	253	7.55%
SIEMENS MEDICAL SOLUTIONS	241	7.19%
EPIC SYSTEMS CORP.	233	6.95%
SELF-DEVELOPED	156	4.65%
ECLIPSYS CORPORATION	145	4.33%
GE HEALTHCARE	127	3.79%
HEALTHLAND	102	3.04%

23 Vendors share the remaining 7.67% of the market.

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

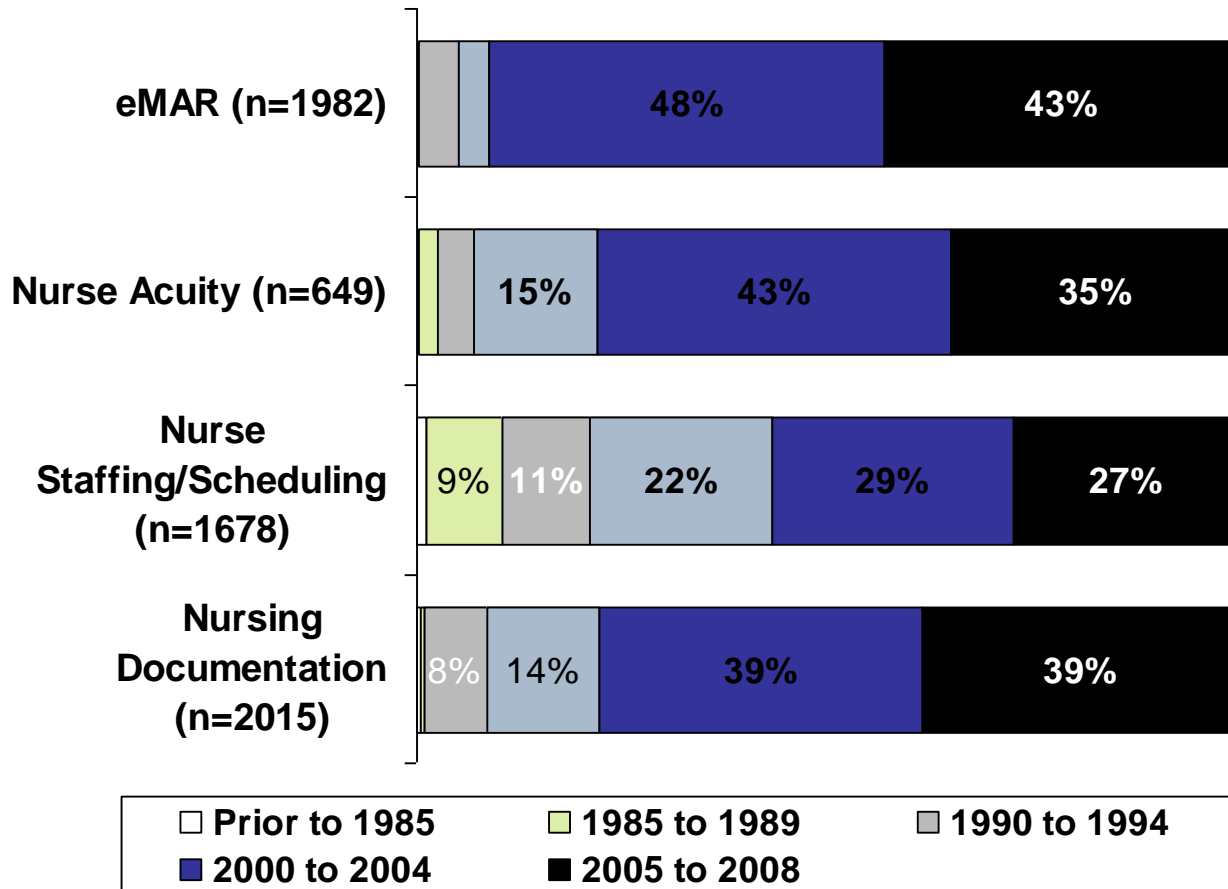
N = 3352

Source: HIMSS Analytics™ Database

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Nursing Applications

Temporal Summary of Installation



The majority of eMAR, nurse acuity and nursing documentation applications were purchased after 1999. Slightly more than half of nurse staffing/scheduling purchases occurred after 1999.



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