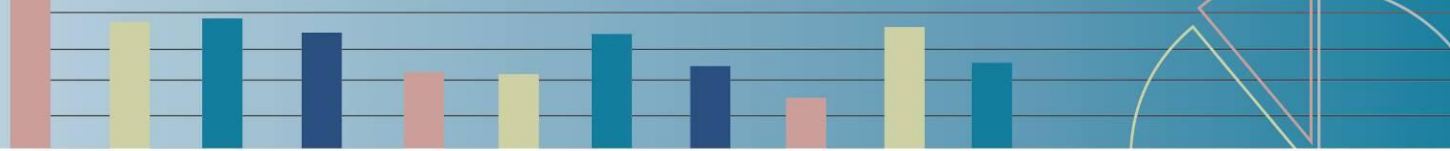


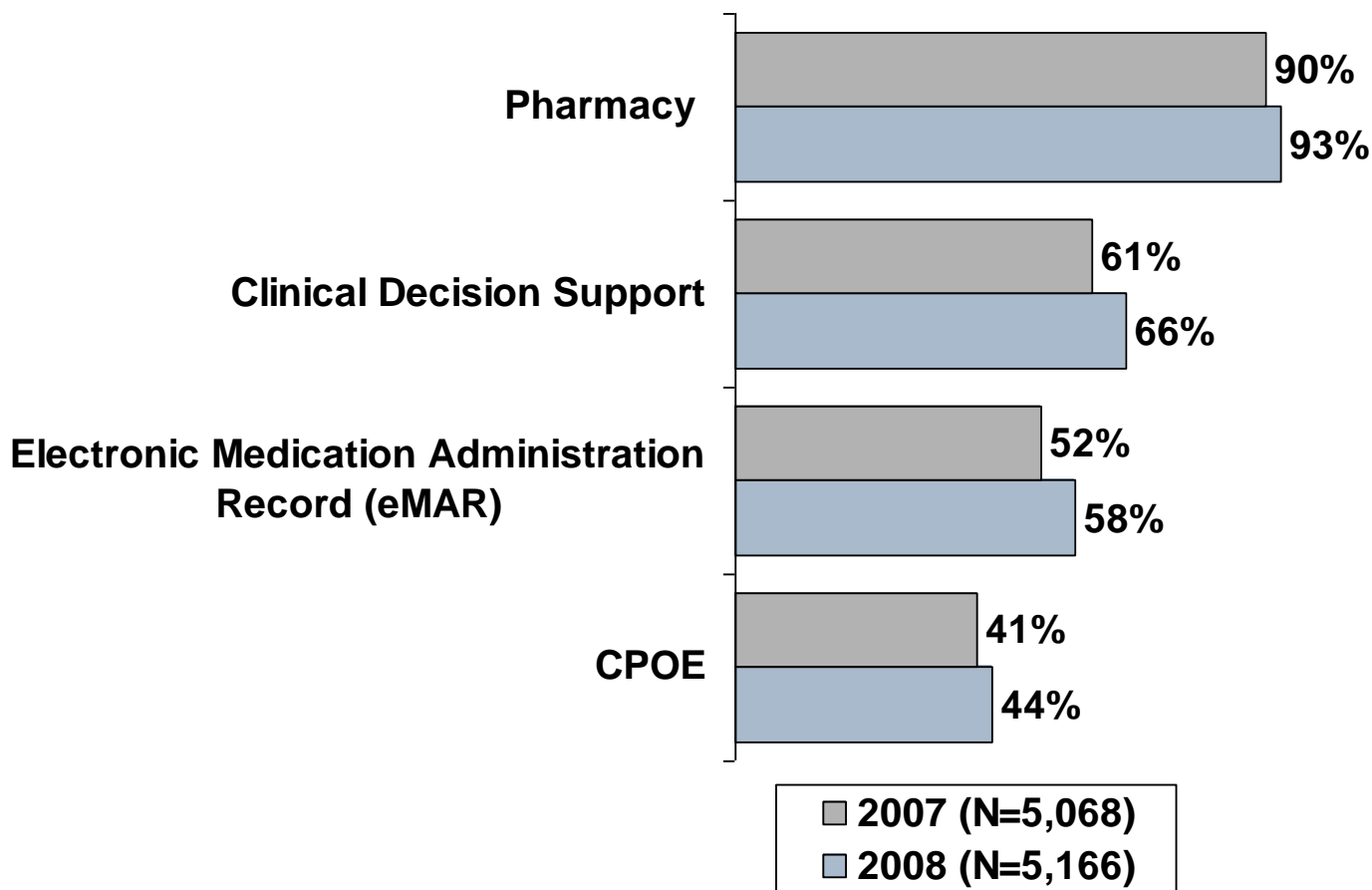
MARKET OVERVIEW

Hospital Patient Safety Applications 2008 Year End Report

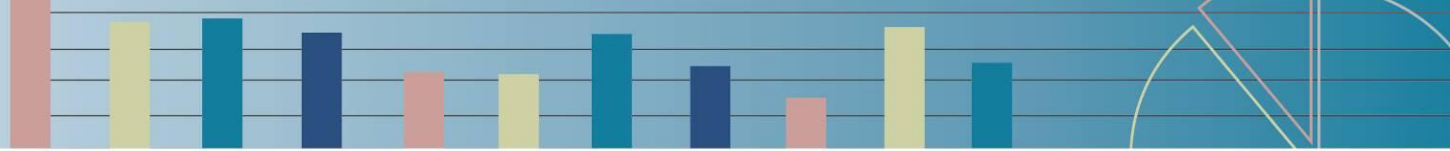


Patient Safety Applications

Summary of Installation (2007/2008)

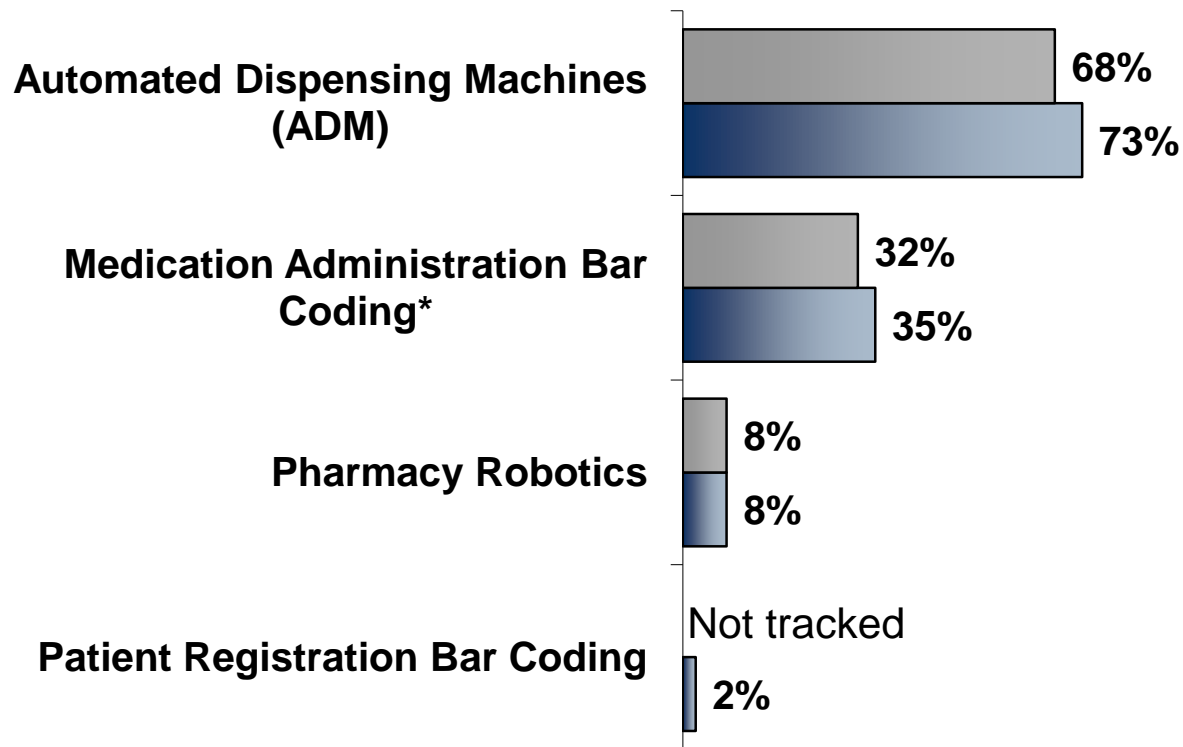


Of all applications relative to patient safety, pharmacy management systems is the closest to reaching market saturation, with approximately 93 percent of hospitals having installed this software in 2008. More than half of the hospitals have installed or plan to install clinical decision support (66 percent) and eMAR (58 percent).



Patient Safety Technology

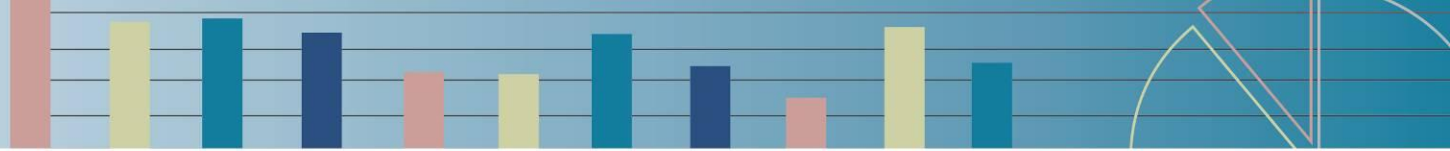
Summary of Installation (2007/2008)



In regards to technology specific to patient safety, the majority of hospitals have automated dispensing machines (73 percent). The implementation of ADMs has increased from 2007 to 2008.

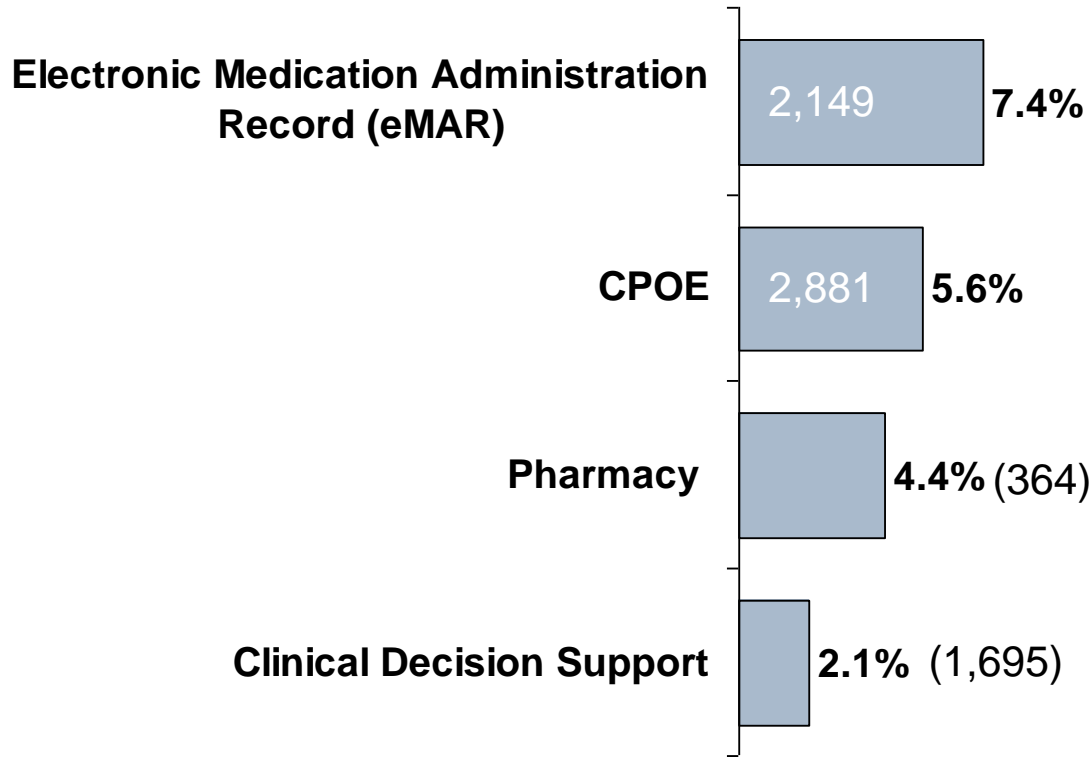
■ 2007 (N=5,068)
 ■ 2008 (N=5,166)

* Medication administration bar coding was referred to as nurse bar coding in 2007



Patient Safety Applications

Summary of Plans (in “Not Automated” Hospitals)



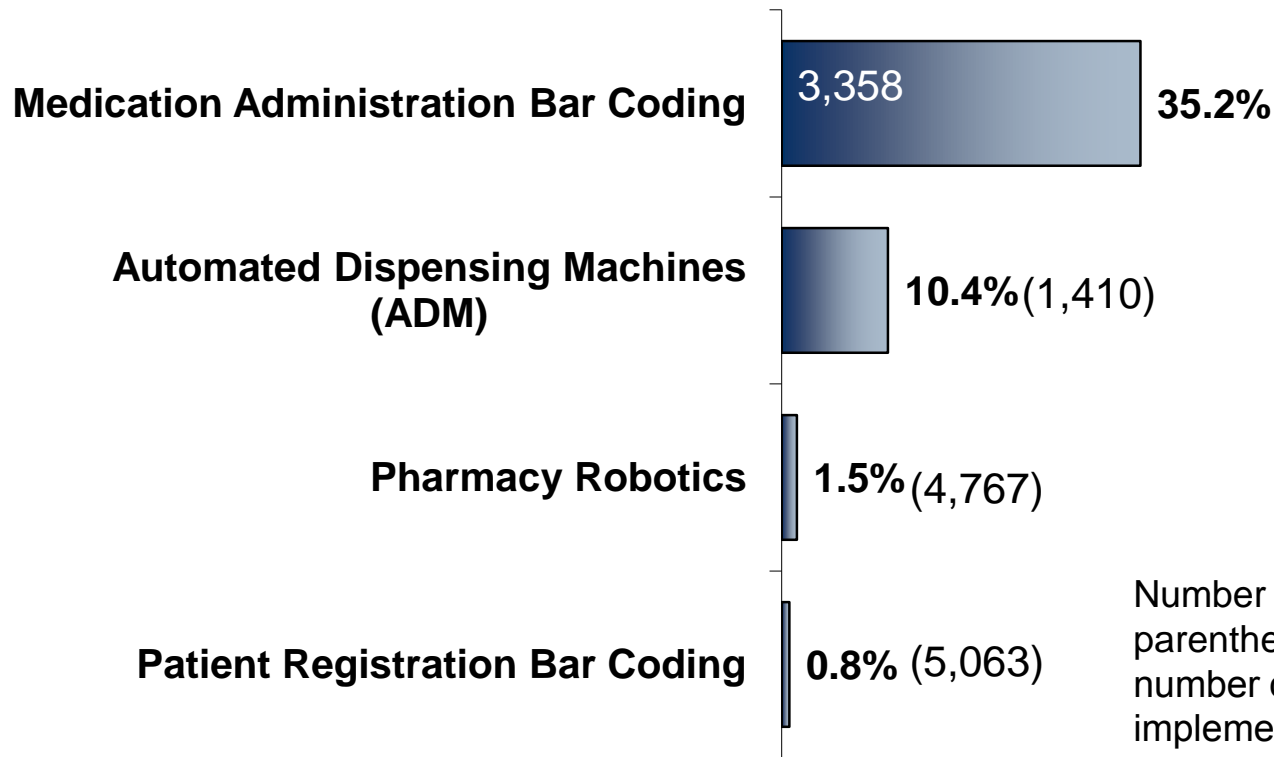
There is moderate activity for purchasing patient safety applications for the first time. By volume and percent, eMAR and CPOE applications are most likely to be purchased in the future.

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

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

Patient Safety Technology

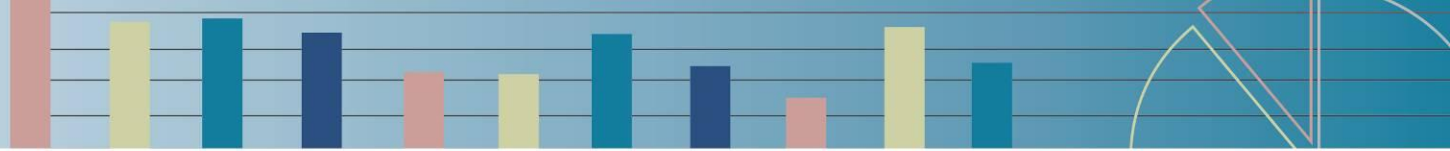
Summary of Plans (in “Not Implemented” Hospitals)



Market activity will be high for medication administration bar coding. More than one in three hospitals (35 percent) that currently do not have this technology are planning to implement.

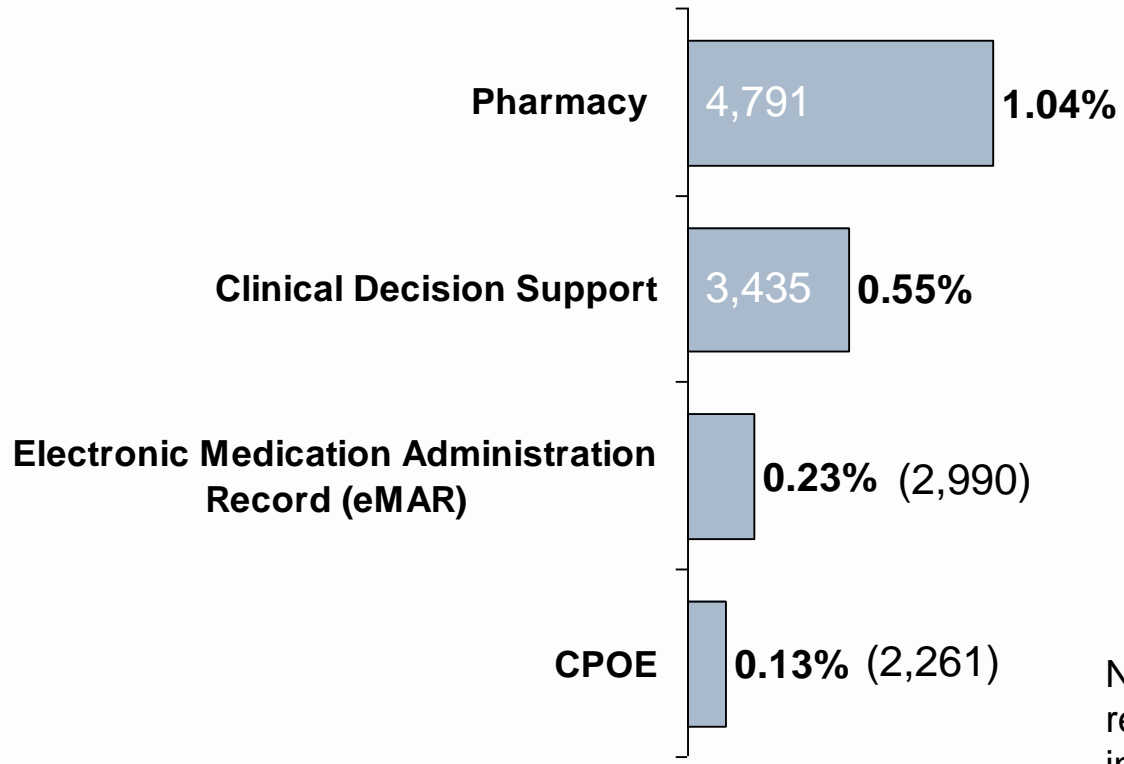
Number in white and parentheses represents number of “not implemented” or “no response” hospitals.

■ Percent of "Not Implemented" or "No response" Hospitals Planning to Purchase Software



Patient Safety Applications

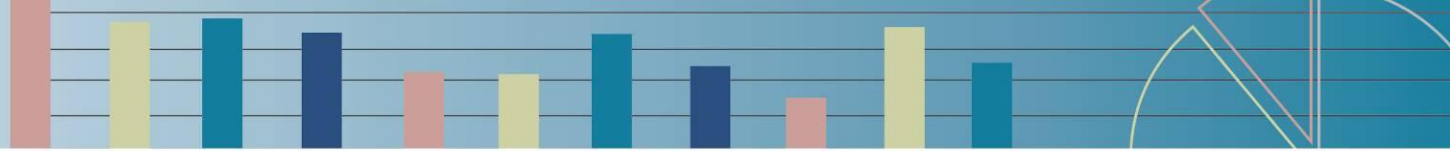
Summary of Plans (Replacing Current Software)



There is very little activity for replacement purchases of patient safety applications. By volume and percent pharmacy management systems are mentioned most often followed by clinical decision support.

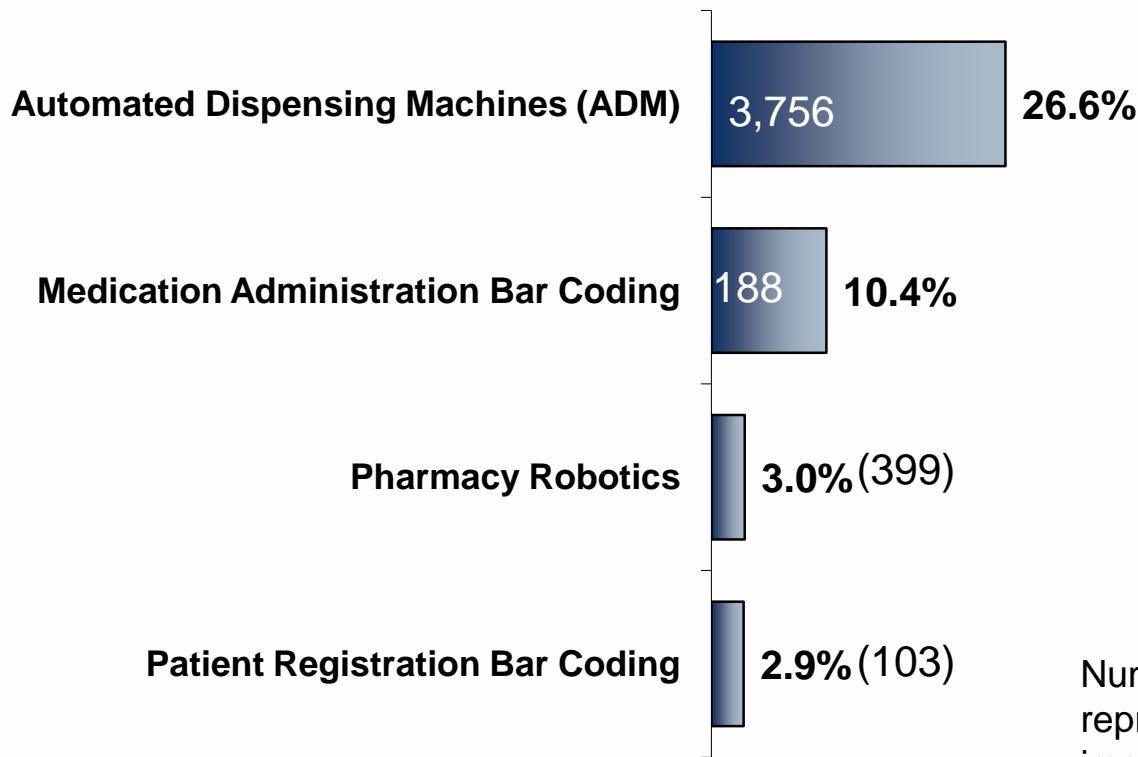
Number in white and parentheses represents number of hospitals with installed or contracted systems

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



Patient Safety Technology

Summary of Plans (Replacing Current Technology)



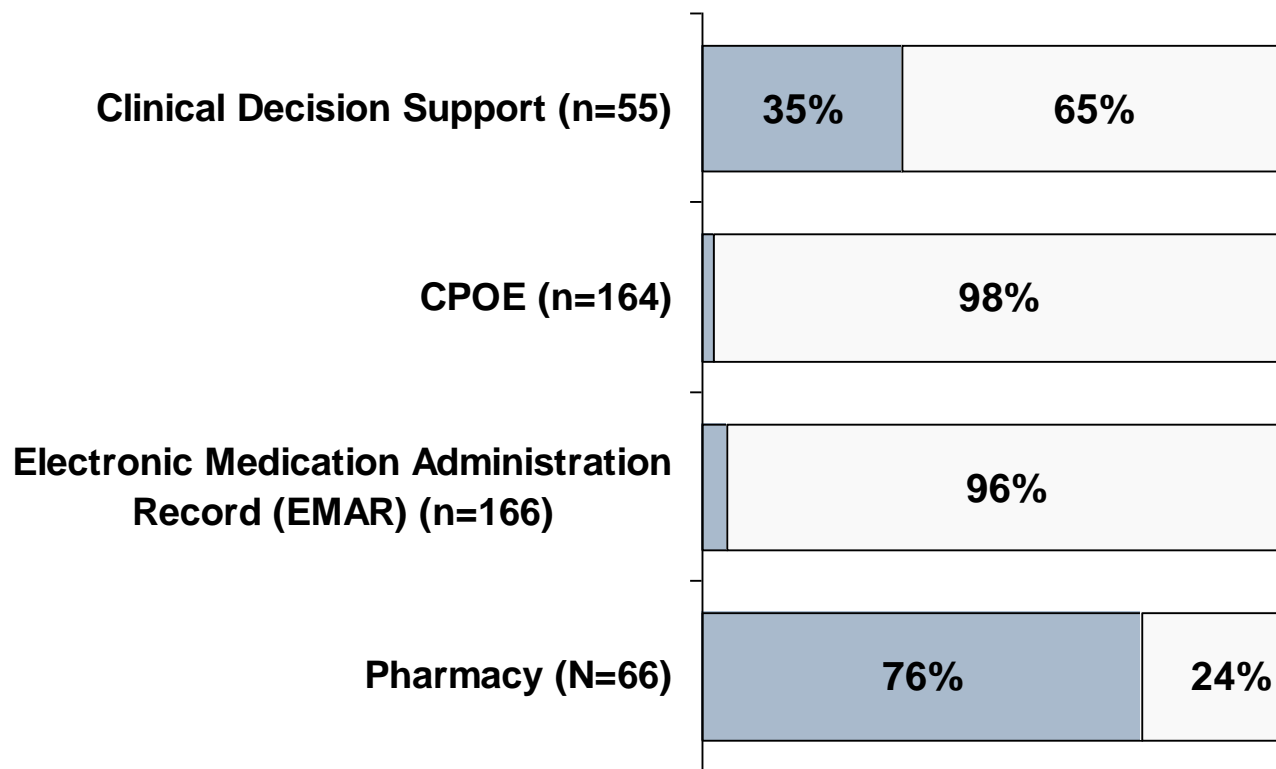
There is high activity for replacement purchases of ADMs (27 percent). More than one in ten hospitals that currently have medication administration bar coding are planning to replace.

Number in white and parentheses represents number of hospitals with implemented technology

■ Percent of Hospitals with Implemented Technology Planning to Purchase

Patient Safety Applications

Summary of Plans

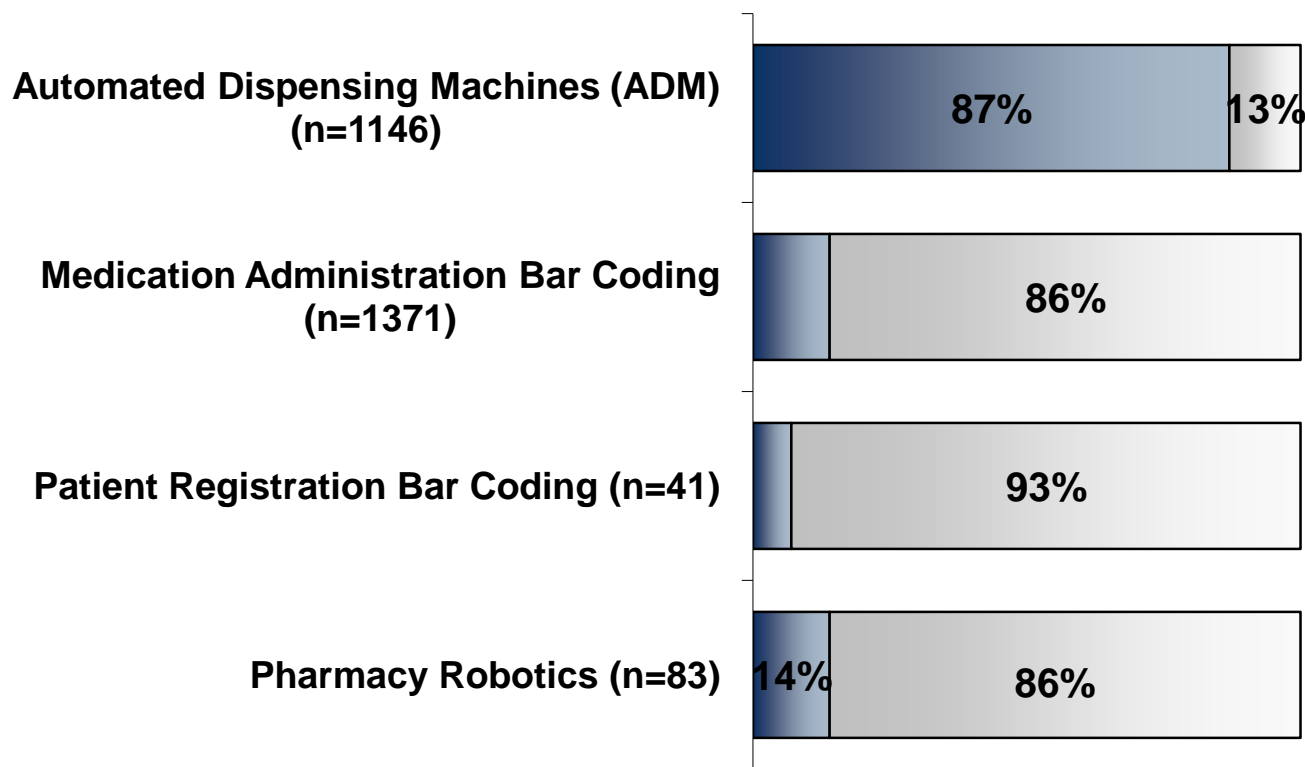


Almost all the planned purchases for eMAR and CPOE will be first time purchases. Pharmacy is the only application to indicate more replacement purchases than first time purchases.

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

Patient Safety Technology

Summary of Plans



With the exception of ADMs, all other patient safety technology purchases will primarily be first time purchases.

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



Summary of Installation

- Only five of 5,166 hospitals have all four patient safety applications installed or contracted to install and all four patient safety technology implemented.
- In regards to software applications associated with patient safety, 1,738 hospitals (34 percent) have indicated that they have installed or contracted to install CPOE, clinical decision support, pharmacy and eMAR applications.
- With respect to technology related to patient safety, 301 organizations (six percent) mentioned that they have implemented at least three of the technologies (ADMs, patient registration bar coding, medication administration bar coding and pharmacy robots).

Clinical Decision Support

Top 10 Installed or Contracted Systems

Vendor	# of Installations	% of Market*
MEDITECH	907	26.77%
MCKESSON PROVIDER TECHNOLOGIES	480	14.17%
CERNER CORPORATION	412	12.16%
SIEMENS MEDICAL SOLUTIONS	270	7.97%
CPSI	241	7.11%
EPIC SYSTEMS CORP.	207	6.11%
ECLIPSYS CORPORATION	175	5.17%
SELF-DEVELOPED	149	4.40%
HEALTHLAND	111	3.28%
HEALTHCARE MANAGEMENT SYSTEMS, INC.	95	2.80%

40 Vendors share the remaining 10.36% of the market.

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

N = 3388

Source: HIMSS Analytics™ Database

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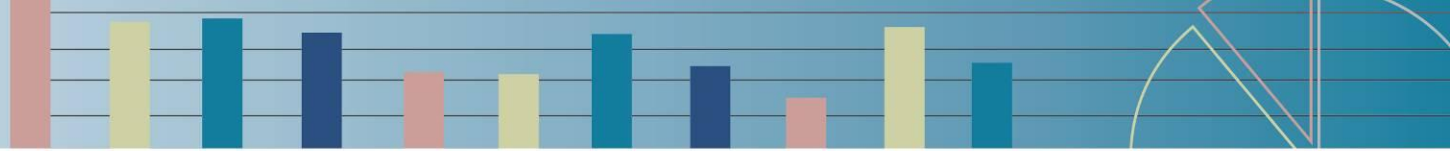


CPOE

Top 10 Installed or Contracted Systems

Vendor	# of Installations	% of Market
MEDITECH	523	23.30%
CERNER CORPORATION	461	20.53%
EPIC SYSTEMS CORP.	231	10.29%
MCKESSON PROVIDER TECHNOLOGIES	216	9.62%
SIEMENS MEDICAL SOLUTIONS	177	7.88%
ECLIPSYS CORPORATION	143	6.37%
SELF-DEVELOPED	131	5.84%
CPSI	106	4.72%
GE HEALTHCARE	102	4.54%
HEALTHLAND	44	1.96%

19 Vendors share the remaining 4.94% of the market.



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%

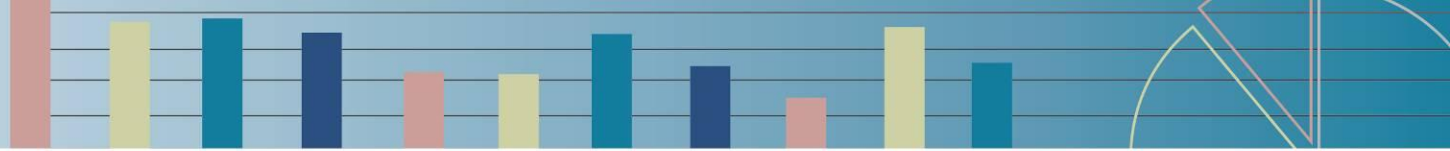
21 Vendors share the remaining 6.23% of the market.

* 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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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%

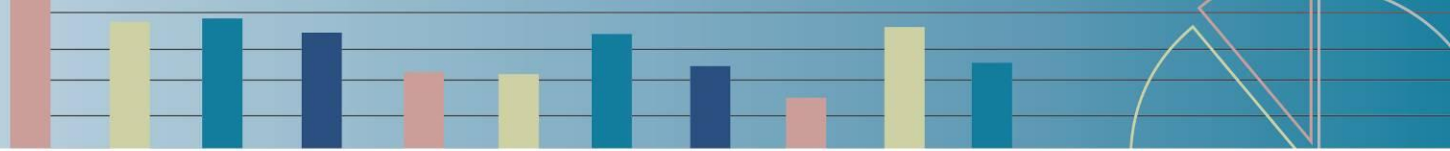
49 Vendors share the remaining 13.70% of the market.

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

N = 4736

Source: HIMSS Analytics™ Database

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Automatic Dispensing Machines (ADM)

Top 10 Installed Systems

Vendor	# of Installations	% of Market*
CARDINAL HEALTH, INC.	2086	60.85%
MCKESSON PROVIDER TECHNOLOGIES	535	15.61%
OMNICELL TECHNOLOGIES	510	14.88%
MED-DISPENSE, LLC.	174	5.08%
AMERISOURCEBERGEN, INC.	84	2.45%
MDG MEDICAL INC.	42	1.23%
DIEBOLD, INC.	19	0.55%
LIONVILLE SYSTEMS, INC.	10	0.29%
BAXTER HEALTHCARE CORPORATION	5	0.15%
AUTOMED TECHNOLOGIES, INC.	2	0.06%
LIFECARE TECHNOLOGIES, INC.	2	0.06%

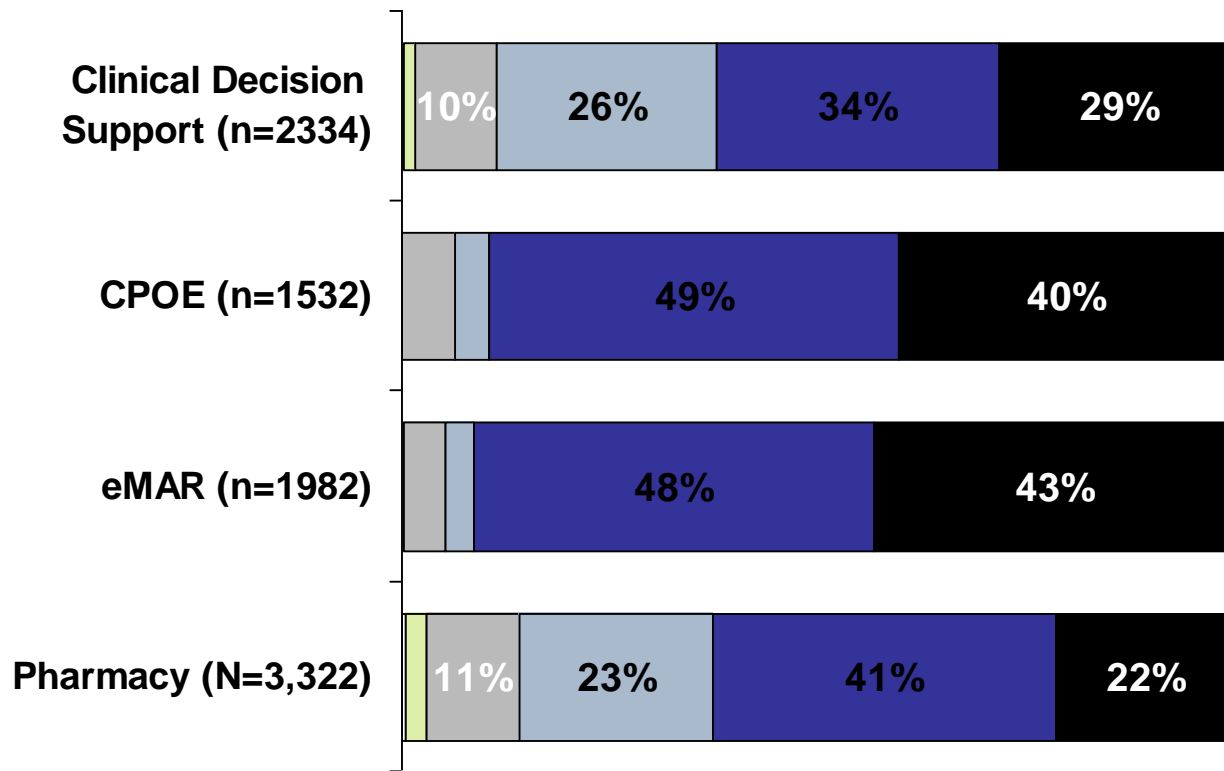
5 Vendors share the remaining 0.15% of the market.

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

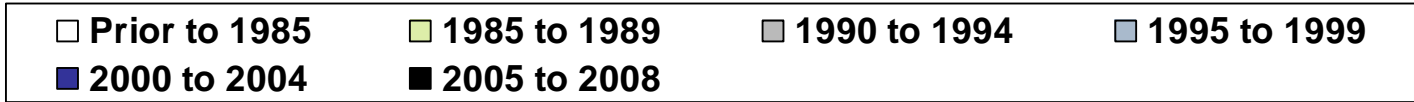
N = 3428

Patient Safety Applications

Temporal Summary of Installation



Almost all of the contracts for CPOE and eMAR were signed after 2000. More than three in five contracts for clinical decision support and pharmacy were signed after 2000.





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