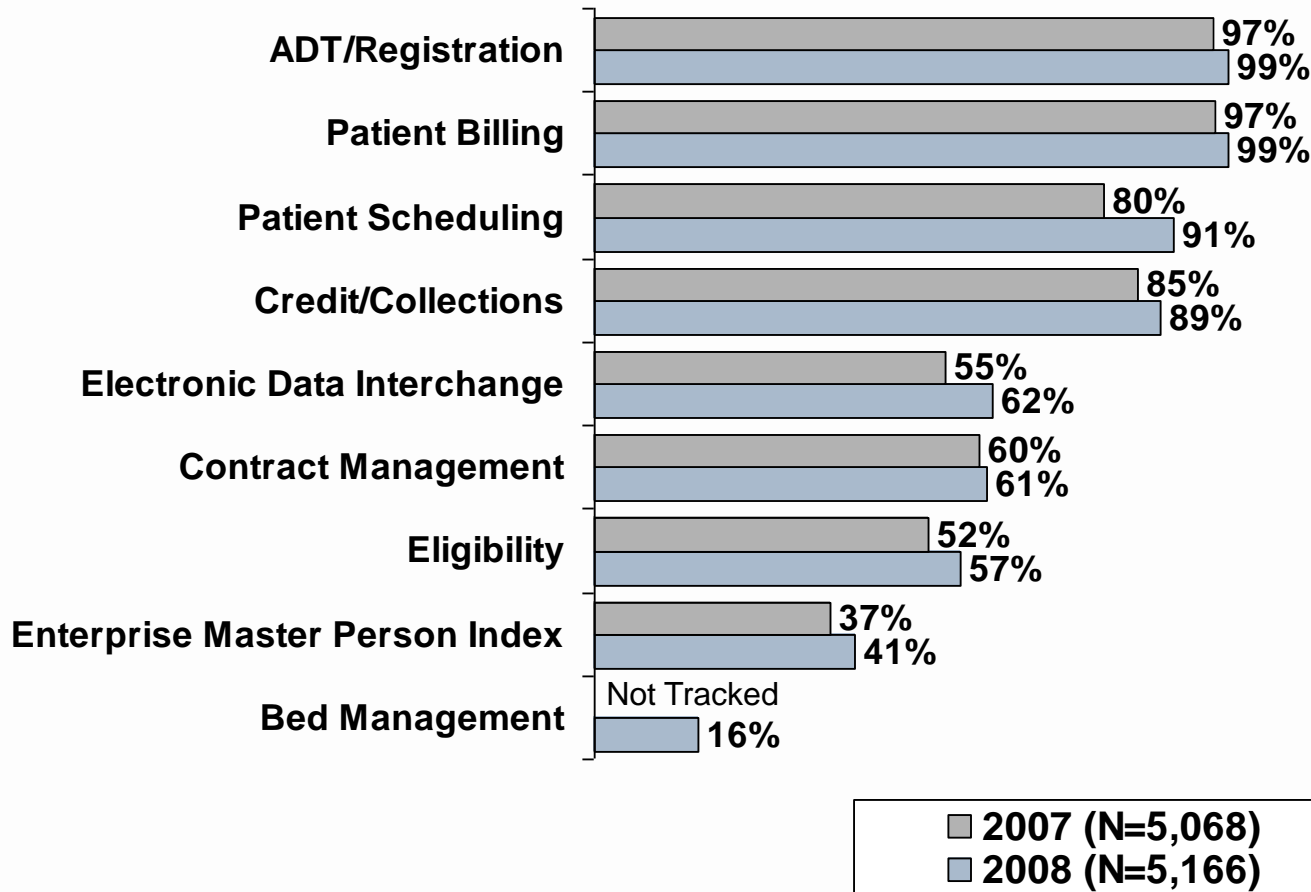


RCM Applications

Summary of Installation (2007/2008)



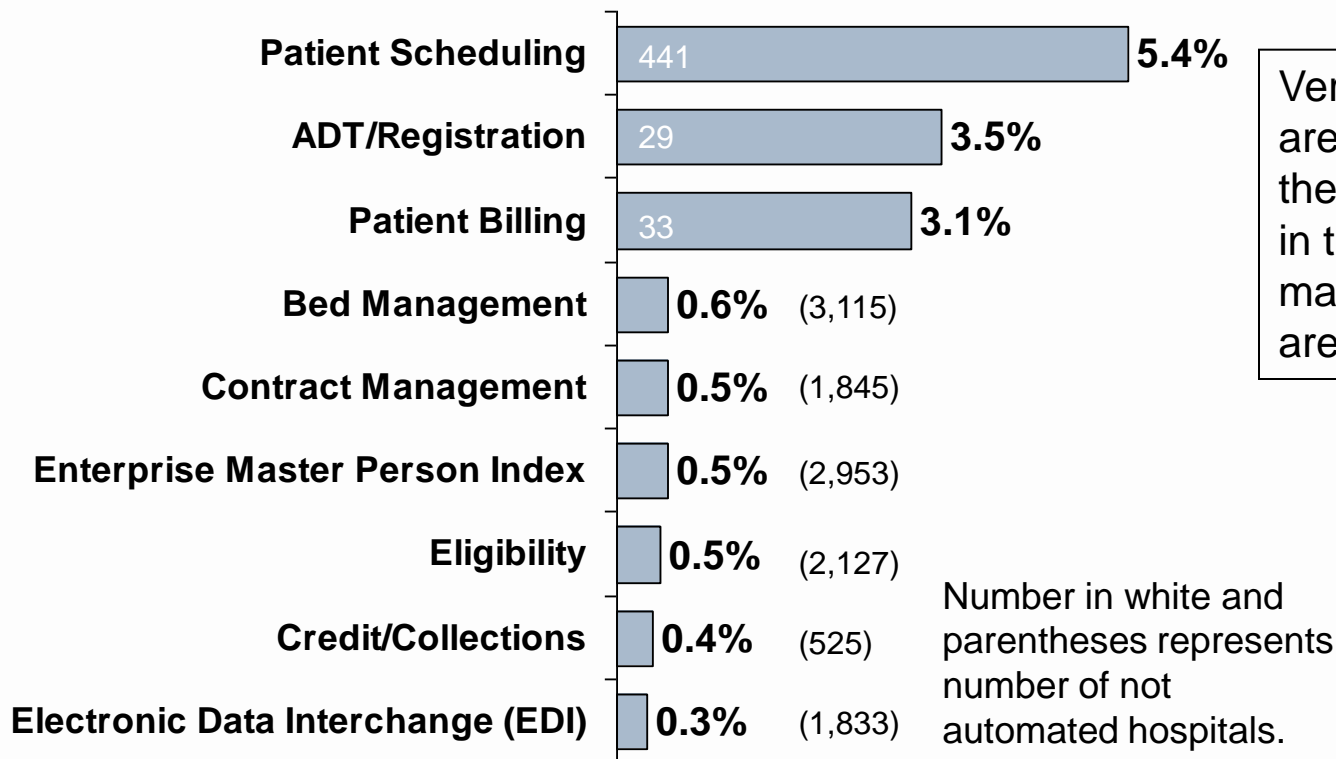
All RCM applications showed a slight increase in the installation rate in the past year. ADT/registration and patient billing are saturated markets, while patient scheduling and electronic data interchange showed the largest increase.

■ 2007 (N=5,068)
 ■ 2008 (N=5,166)



RCM Applications

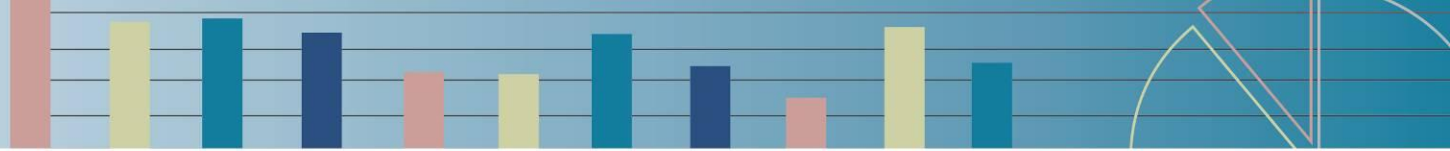
Summary of Plans (in “Not Automated” Hospitals)



Very few hospitals that are not presently using the applications outlined in this report intend to make a purchase in this area.

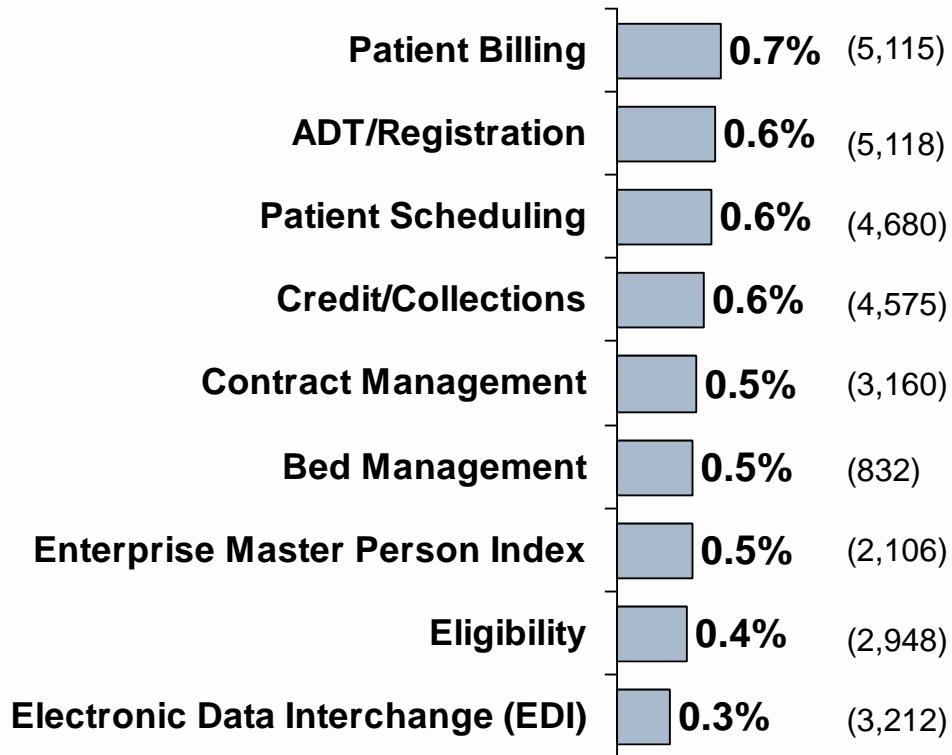
Number in white and parentheses represents number of not automated hospitals.

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



RCM Applications

Summary of Plans (Replacing Current Software)



Replacement activity in the RCM space is minimal. Market activity will be strongest for patient billing followed by ADT/Registration and patient scheduling and credit/collections applications.

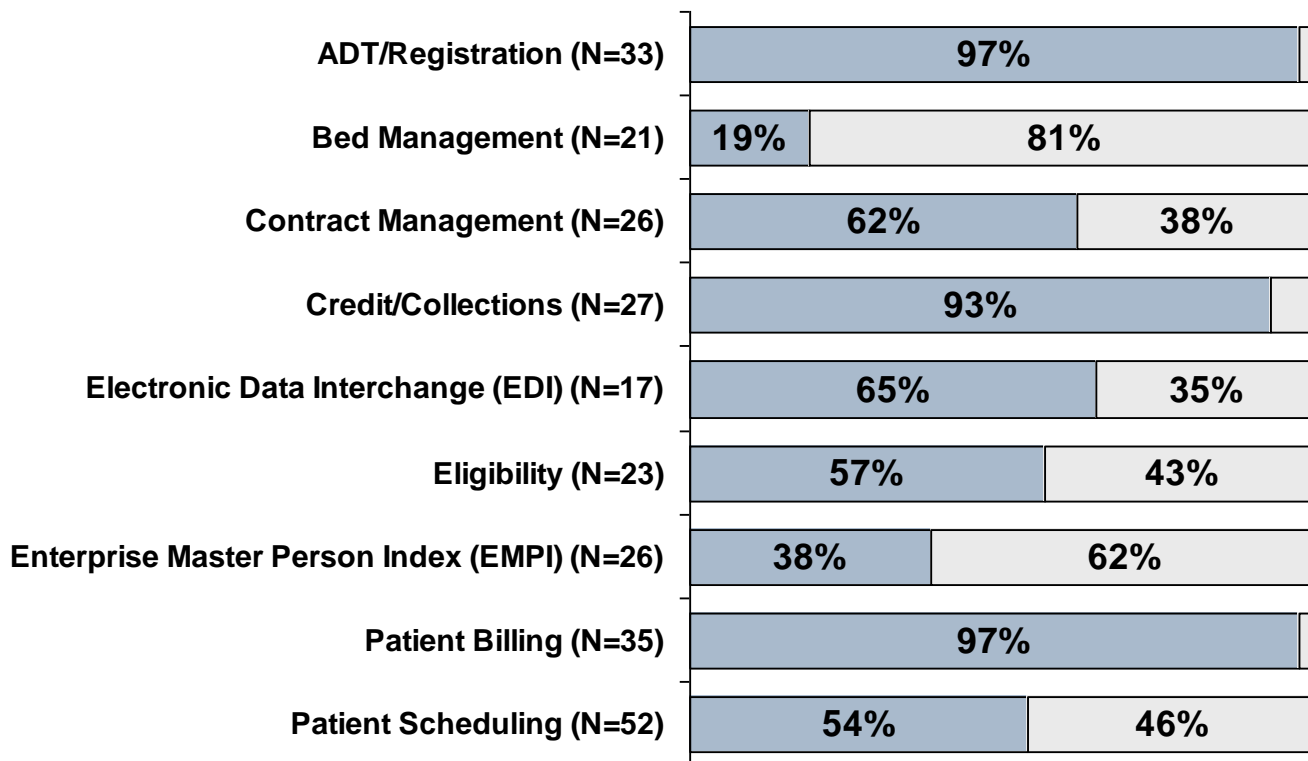
Number in parenthesis represents number of hospitals with installed or contracted systems

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



RCM Applications

Summary of First Time Purchase & Replace



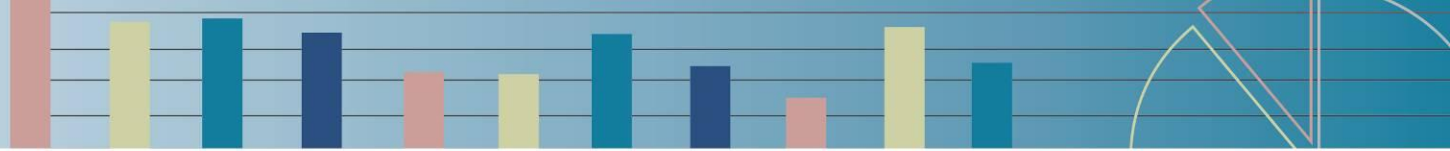
The majority of purchases for ADT/Registration, credit/collections and patient billing will be among hospitals that plan to replace existing software. Bed management and EMPI application purchases will most likely be first time purchases.





Summary of Installations

- 336 hospitals (7 percent) have installed software or signed a contract for software in all nine application areas.
 - Of the 336 hospitals, 4 hospitals (1 percent) use the same vendor for all nine application areas.
- In addition, 725 hospitals (14 percent) have either installed or signed a contract for eight of the nine RCM applications.
- Sixteen percent (16 percent) of the hospitals have at least seven of nine RCM applications installed or signed a contract for installation.



ADT/Registration

Top Ten Installed and Contracted Systems

Vendor	# of Installations	% of Market*
MEDITECH	1270	24.89%
MCKESSON PROVIDER TECHNOLOGIES	769	15.07%
SIEMENS MEDICAL SOLUTIONS	702	13.76%
CPSI	438	8.58%
HEALTHLAND	378	7.41%
HEALTHCARE MANAGEMENT SYSTEMS, INC.	328	6.43%
CERNER CORPORATION	215	4.23%
EPIC SYSTEMS CORP.	200	3.92%
SELF-DEVELOPED	166	3.25%
GE HEALTHCARE	132	2.59%

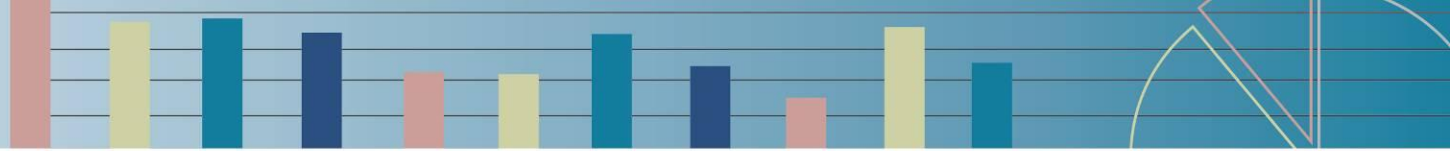
41 Vendors share the remaining 9.96% of the market.

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

N = 5102

Source: HIMSS Analytics™ Database

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Bed Management

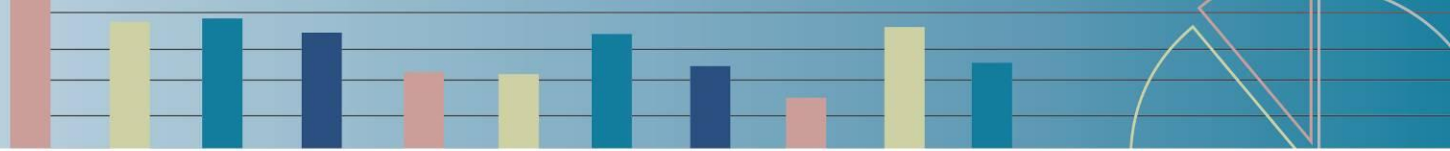
Top Ten Installed and Contracted Systems

Vendor	# of Installations	% of Market*
MEDITECH	181	23.72%
TELETRACKING TECHNOLOGIES INC.	150	19.66%
MCKESSON PROVIDER TECHNOLOGIES	144	18.87%
SIEMENS MEDICAL SOLUTIONS	86	11.27%
CERNER CORPORATION	68	8.91%
SELF-DEVELOPED	35	4.59%
EPIC SYSTEMS CORP.	35	4.59%
PREMISE CORPORATION	21	2.75%
PICIS	14	1.83%
GE HEALTHCARE	9	1.18%
HILL-ROM CO., INC.	9	1.18%

7 Vendors share the remaining 1.57% of the market.

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

N = 763



Contract Management

Top Ten Installed or Contracted Systems

Vendor	# of Installations	% of Market*
MCKESSON PROVIDER TECHNOLOGIES	456	14.58%
MEDITECH	405	12.95%
SELF-DEVELOPED	337	10.77%
SIEMENS MEDICAL SOLUTIONS	245	7.83%
CPSI	176	5.63%
AMISYS SYNERTECH, INC.	163	5.21%
HEALTHCARE MANAGEMENT SYSTEMS, INC.	145	4.64%
LAWSON SOFTWARE	140	4.48%
ECLIPSYS CORPORATION	134	4.28%
THE MEDSTAT GROUP	124	3.96%

66 Vendors share the remaining 25.90% of the market.

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

N = 3128

Source: HIMSS Analytics™ Database

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Credits/Collections

Top Ten Installed or Contracted Systems

Vendor	# of Installations	% of Market*
MEDITECH	1028	22.92%
MCKESSON PROVIDER TECHNOLOGIES	712	15.87%
SIEMENS MEDICAL SOLUTIONS	688	15.34%
CPSI	355	7.91%
SELF-DEVELOPED	305	6.80%
HEALTHCARE MANAGEMENT SYSTEMS, INC.	300	6.69%
HEALTHLAND	280	6.24%
EPIC SYSTEMS CORP.	165	3.68%
CERNER CORPORATION	100	2.23%
GE HEALTHCARE	94	2.10%

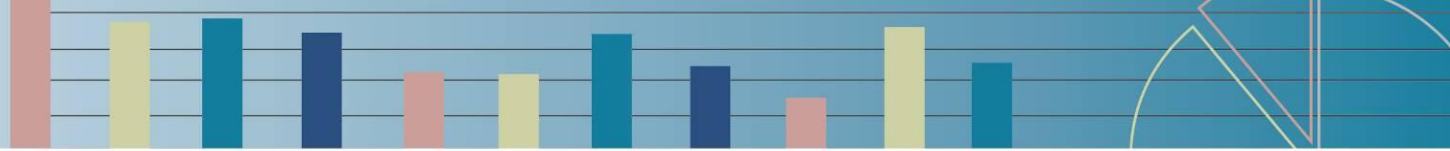
52 Vendors share the remaining 10.28% of the market.

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

N = 4486

Source: HIMSS Analytics™ Database

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Electronic Data Interchange

Top Ten Installed or Contracted Systems

Vendor	# of Installations	% of Market*
MCKESSON PROVIDER TECHNOLOGIES	619	20.34%
SSI GROUP	552	18.13%
MEDITECH	210	6.90%
CPSI	193	6.34%
SELF-DEVELOPED	191	6.27%
SIEMENS MEDICAL SOLUTIONS	176	5.78%
HEALTHCARE MANAGEMENT SYSTEMS, INC	118	3.88%
MEDASSETS	86	2.83%
CAREMEDIC SYSTEMS, INC.	79	2.60%
HEALTHLAND	71	2.33%

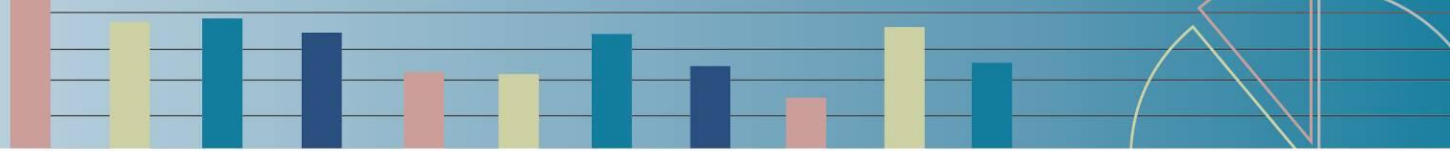
80 Vendors share the remaining 25.39% of the market.

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

N = 3044

Source: HIMSS Analytics™ Database

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Eligibility

Top Ten Installed or Contracted Systems

Vendor	# of Installations	% of Market*
SIEMENS MEDICAL SOLUTIONS	429	15.16%
MCKESSON PROVIDER TECHNOLOGIES	371	13.11%
SAGE SOFTWARE	273	9.65%
MEDITECH	258	9.12%
PASSPORT HEALTH COMMUNICATIONS, INC.	252	8.91%
CPSI	175	6.19%
HLTH CORPORATION	150	5.30%
SSI GROUP	145	5.13%
HEALTHLAND	105	3.71%
EPIC SYSTEMS CORP.	86	3.04%

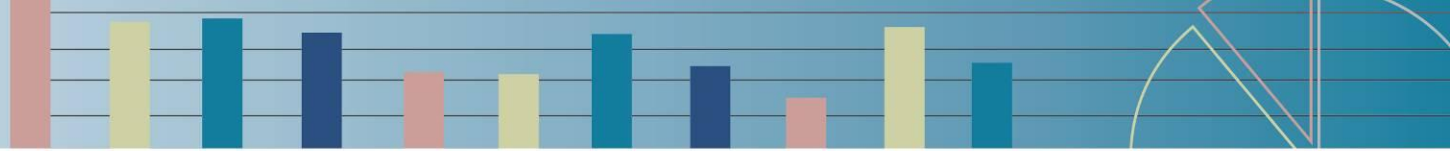
56 Vendors share the remaining 21.03% of the market.

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

N = 2829

Source: HIMSS Analytics™ Database

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Enterprise Master Person Index

Top Ten Installed or Contracted Systems

Vendor	# of Installations	% of Market*
MEDITECH	525	25.54%
MCKESSON PROVIDER TECHNOLOGIES	275	13.38%
SIEMENS MEDICAL SOLUTIONS	273	13.28%
CERNER CORPORATION	197	9.58%
CPSI	154	7.49%
INITIATE SYSTEMS	142	6.91%
EPIC SYSTEMS CORP.	136	6.61%
SELF-DEVELOPED	70	3.40%
HEALTHLAND	65	3.16%
GE HEALTHCARE	54	2.63%

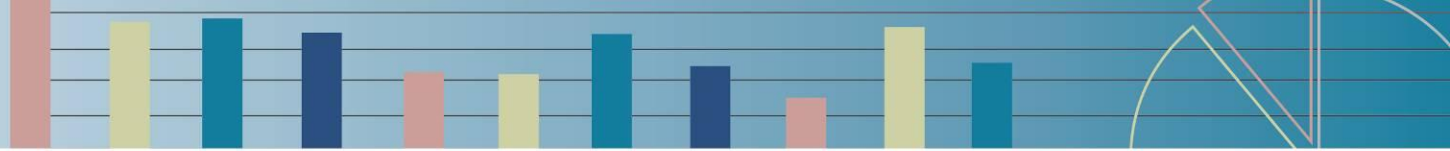
17 Vendors share the remaining 8.22% of the market.

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

N = 2056

Source: HIMSS Analytics™ Database

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Patient Billing

Top Ten Installed or Contracted Systems

Vendor	# of Installations	% of Market*
MEDITECH	1117	22.01%
MCKESSON PROVIDER TECHNOLOGIES	815	16.06%
SIEMENS MEDICAL SOLUTIONS	747	14.72%
CPSI	437	8.61%
HEALTHLAND	372	7.33%
SELF-DEVELOPED	331	6.52%
HEALTHCARE MANAGEMENT SYSTEMS, INC.	318	6.27%
EPIC SYSTEMS CORP.	187	3.69%
GE HEALTHCARE	109	2.15%
QUADRAMED CORPORATION	98	1.93%

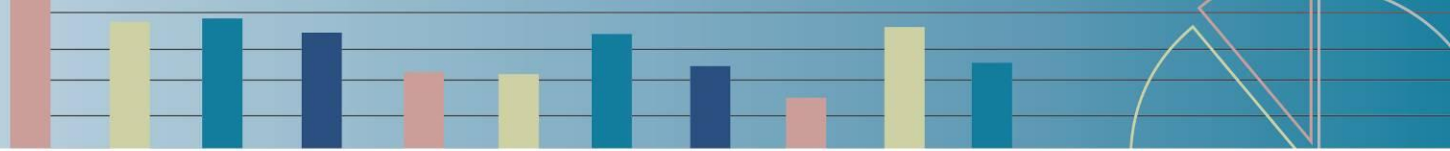
45 Vendors share the remaining 10.84% of the market.

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

N = 5074

Source: HIMSS Analytics™ Database

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Patient Scheduling

Top Ten Installed or Contracted Systems

Vendor	# of Installations	% of Market*
MEDITECH	1226	26.42%
MCKESSON PROVIDER TECHNOLOGIES	691	14.89%
SIEMENS MEDICAL SOLUTIONS	451	9.72%
CPSI	387	8.34%
HEALTHCARE MANAGEMENT SYSTEMS, INC.	288	6.21%
HEALTHLAND	285	6.14%
CERNER CORPORATION	269	5.80%
EPIC SYSTEMS CORP.	217	4.68%
QUADRAMED CORP.	174	3.75%
SELF-DEVELOPED	148	3.19%

43 Vendors share the remaining 11.01% of the market.

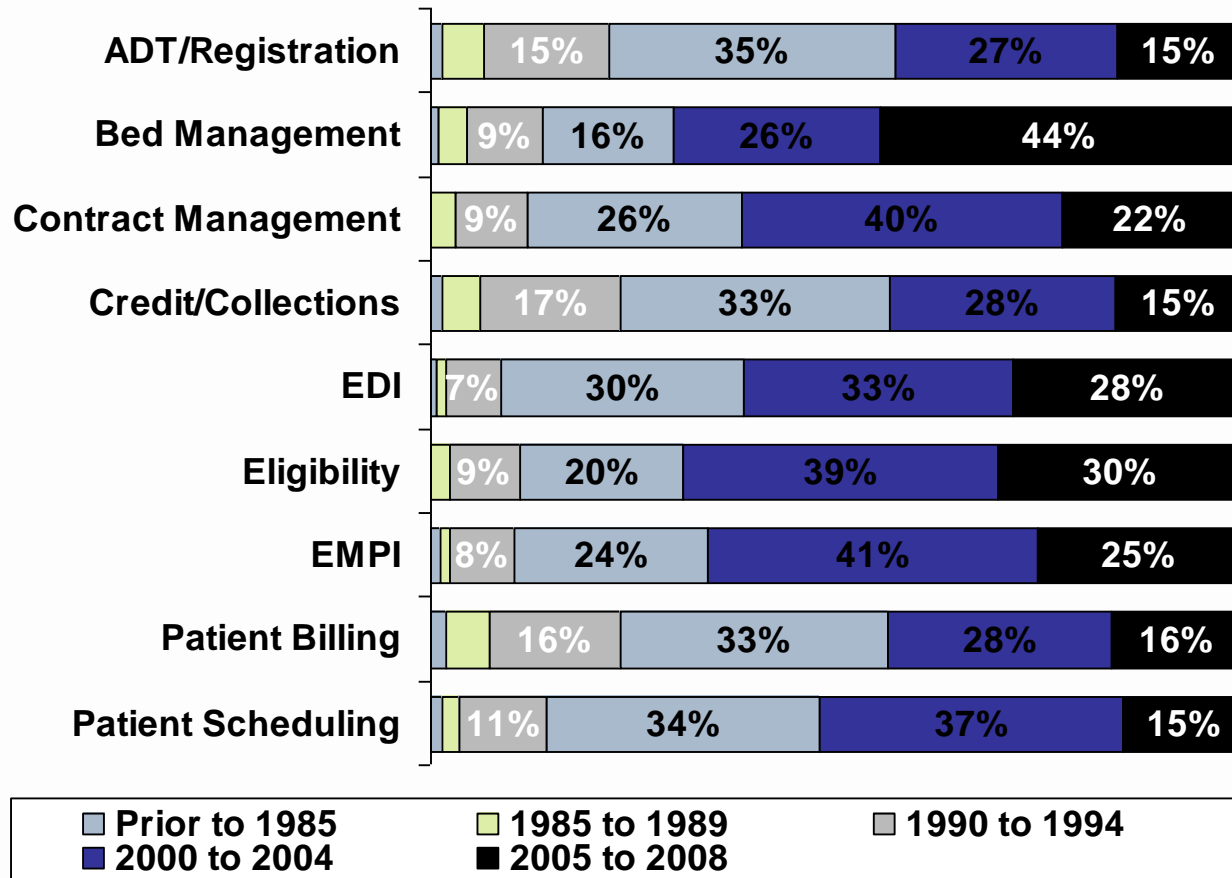
* The total percentage may exceed 100 percent due to rounding or some organization may have more than one vendor installed.

N = 4640

Source: HIMSS Analytics™ Database

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RCM Applications Summary of Installation



The majority of market activity for RCM applications has taken place since 1995. More specifically, at least 60 percent of purchases for bed management, contract management, EDI, eligibility, and EMPI occurred after 2000.



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