
THE FINANCIAL SYSTEMS HOSPITAL IT MARKET, 1998-2005



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span of years they tend to jockey for positioning in the rankings. The top four software companies—along with a major subset of hospitals that “self-develop” their own financial applications—usually represent more than 50 percent of the combined market in the various categories.

This should come as no surprise. Many vendors have highly integrated suites available for clients. Lawson, MEDITECH, McKesson Provider Technologies, Siemens Medical Solutions, CPSI and many others have modules for the applications highlighted in this white paper.

If a hospital selects a financial systems vendor, we have found that it is probable the institution will implement several modules of a financial suite of applications. That is an example of the types of issues that this white paper outlines.

The paper surveys each of the 12 common applications within the financial systems arena: accounts payable, benefits administration, case mix management, cost accounting, credit/collections, electronic claims, executive information systems, general ledger, materials management, payroll, patient billing and registration/ADT.

The white paper offers a closer look at each application area in detail, while highlighting any noteworthy developments, such as acquisitions or significant increases in market share. Accompanying charts provide snapshots of the ever-changing positioning of the top 10 vendors in each segment.

The data, in aggregate, tells several stories. For instance, the vast majority of hospitals have all or most of the applications commonly followed by Dorenfest & HIMSS Analytics, with one exception—executive information systems. Slightly more than 63 percent of hospitals have deployed that application,

INTRODUCTION: THE VIEW FROM ABOVE

The market for software used by hospital financial departments has been growing increasingly concentrated over the last seven years. These applications fall into the 12 basic categories that are examined in this paper, each of which is dominated by that segment’s top 10 suppliers.

In fact, several major companies are listed repeatedly in most categories’ top 10 rankings, though over a

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the lowest penetration of any of the financial software categories. The rest of the segments—with only one other exception—have installation rates of more than 92 percent. (Cost accounting has a penetration rate of 82 percent.)

That might lead one to conclude that financial systems is a “mature” software market. But that may not quite be true. A closer look at the data reveals that “self-developed” applications—those created in-house by hospital information technology departments and subcontractors—occupies one of the top five positions in every segment. Almost 22 percent of executive information systems are developed in-house, the highest rate among any financial applications (in fact, ranking first in that category). Self-developed applications range from 6 percent to 14 percent of the overall market in various segment, ranking from first to fifth on various lists.

This suggests there are opportunities for software firms to sell their products to hospitals that still use in-house systems. This white paper does not investigate the reasons why self-developed systems are so prevalent. Factors like price, quality, interfacing issues and customization likely play a role. It is also possible that there remains a lingering lack of confidence in some corners toward commercially available products.

The data reveals a second story: The top 10 suppliers (here we include “self-developed”) utterly dominate their markets, ranging in 2005 from a 76.23 percent share in electronic claims, to 89.84 percent in patient billing. Vendors holding down positions 11 to 15 on these lists rarely control more than 2 percent of the market; most own between 1 and 2 percent. Nor is top 10 market share evenly dispersed—in most cases the leading three or four companies, plus self-developed systems, control 50 percent of the market or more. While each category might contain as many

as 30 vendors overall, that is no indication that these segments are as robust as they might appear. Most vendors maintain less than a 1 percent market share.

The data gives one final insight: A handful of industry-leading companies have demonstrated staying power throughout the years in this survey—CPSI, Dairyland Healthcare Solutions, Healthcare Management Systems, Inc., Lawson Software, IDX, MEDITECH, McKesson, PeopleSoft and Siemens Medical Solutions among them. Several others (Cerner Corp., Eclipsys Corp., Epic Systems Corp., QuadraMed and SSA Global Technologies Inc.) occupy top 10 slots in just a few segments.

Two important acquisitions occurred between 1998 and 2005 that transformed the financial healthcare software market. When McKesson Corp. acquired HBOC, Inc. in 1999 and Siemens merged with Shared Medical Systems (SMS) to form Siemens Medical Solutions in 2000, both became dominant in nearly every financial services category. Both hold one of the top six positions in every segment.

As might be expected, companies with smaller market shares often change places among the top 10. In some years, companies occupying 11th to 15th place on various lists might slip briefly into the top 10, only to slip out again in subsequent years as acquisitions or aggressive marketing pushes their competitors further up the ranks. Some may appear in the top four spots in several segments yet fail to rank in other markets.

The good news for providers is that no one dominant corporation holds a monopoly share in all applications—there are no Microsofts here. MEDITECH leads or is near the top in every category, but Lawson has overtaken it in several categories over the seven year arc of this report. Competition for the top slots remains fierce.

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ACCOUNTS PAYABLE

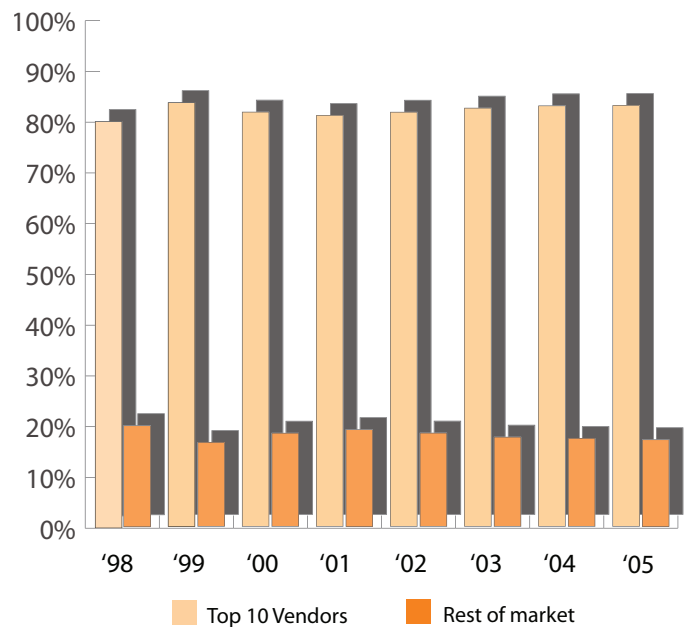
Vendors in this category distribute software that provides control over cash flow, with specific information on disbursement and invoices. It includes online entry, inquiry and reporting capabilities, and may be part of an enterprise resource planning (ERP) suite of applications.

The top 10 accounts payable suppliers accounted for 82.92 percent of the market in 2005. Top vendors include Lawson Software (16.90 percent), MEDITECH (16.83 percent) and McKesson Provider Technologies (12.78 percent). Siemens Medical Solutions, PeopleSoft, CPSI, Healthcare Management Systems, Inc., SAP and Dairyland Healthcare round out the top 10. Each of these vendors holds between 7.33 and 2.68 percent of the market. In addition, 9.95 percent of the market uses self-developed applications.

In 2005, 3,937 hospitals had either installed patient billing software or had signed a contract to do so. This represents 98.18 percent of the hospitals tracked in the sample, compared to 94.27 percent in 1998.

- Several companies have previously appeared on the top 10 list, but have since fallen down a few positions. These include Global Software, Inc. and GEAC.
- The track of self-developed applications in this segment has been a bit unusual. In 1998, self-developed applications were third on the top 10 list, before falling as low as sixth place in 2000. But by 2003, they rebounded to fourth place, where they remain.
- SAP Healthcare's market share rose spectacularly over the past two years, jumping from 16th place on the list with an 0.81 percent market share in 2004, to ninth place with a 2.75 percent share in 2005.

Accounts Payable
Aggregate Top Ten Vendor Market Share



Data from 1998 to 2003 comes from the Dorenfest IHDS+ Database™. Data from 2004 and 2005 comes from the HIMSS Analytics™ Database (derived from the Dorenfest IHDS+ Database™).

HIGHLIGHTS

- Lawson overtook MEDITECH for first place in 2005 after MEDITECH held that position for six straight years.
- Healthcare Management joined the top 10 list in 2002. Before that, it had not appeared among the top entries.

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BENEFITS ADMINISTRATION

Benefits administration software is an application that manages human resources benefits, including defined contributions, defined benefits, flexible benefits, and health and welfare plans.

The top 10 benefits administration suppliers accounted for 78.52 percent of the market in 2005. Top vendors include Lawson Software (20.45 percent), MEDITECH (15.25 percent) and PeopleSoft (12.06 percent). McKesson Provider Technologies, Siemens Medical Solutions, Healthcare Management Systems, Inc., CPSI, Automatic Data Processing, Inc. (ADP) and SSA Global Technologies, Inc. round out the top 10. Each holds between 5.94 and 2.54 percent of the market. In addition, 6.43 percent of the market uses self-developed applications.

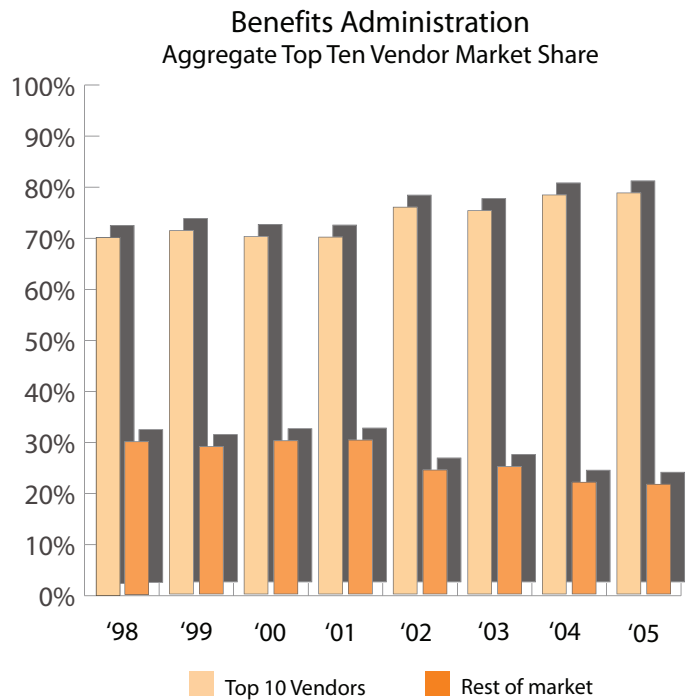
In 2005, 3,971 hospitals had either installed benefits administration software or had signed a contract to do so. This represents 94.54 percent of the hospitals tracked in the sample, compared to 82.06 percent in 1998.

HIGHLIGHTS

- Lawson has gradually gained market share since 1998, starting in seventh place and moving to the top of the list in 2003. That might have to do with the 1999 acquisition of Ijob, an Edmond, Okla.-based benefits-tracking and employee-training software

provider. Improved integration of its financial suite likely also played a role.

- MEDITECH, PeopleSoft and Siemens have been in the top 10 for seven years straight, as have self-developed applications. McKesson has been in the top 10 the past six years.
- Lawson, MEDITECH and PeopleSoft collectively own slightly more than 48 percent of the market. No other vendor rises above a 6 percent market share.
- SSA Global made its first appearance in the top 10 in 2003. The reason? The company has acquired 11 enterprise software firms since 2001. SSA says the acquisitions enhance the value of its ERP offerings.



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CASE MIX MANAGEMENT

Vendors in this category provide software that provides integrated information from admission, discharge, transfer, utilization review, patient billing and abstracting to monitor and understand the mix of patient types and patient services delivered.

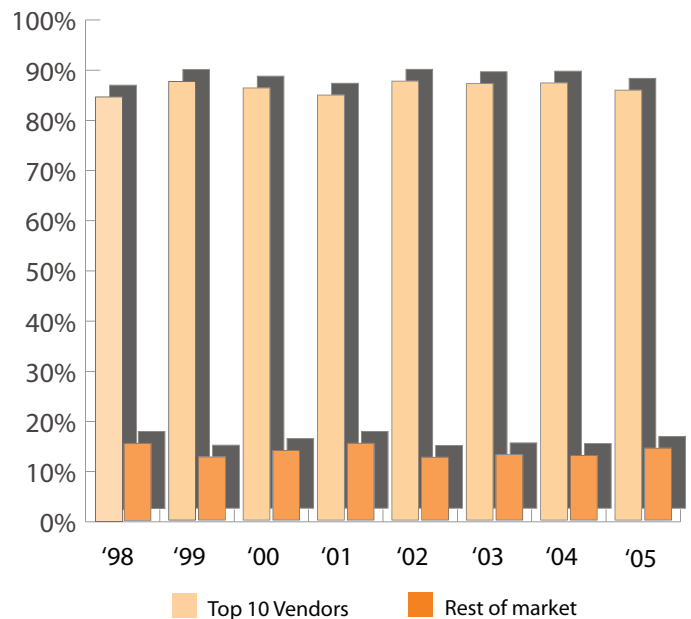
The top 10 case mix management suppliers accounted for 85.67 percent of the market in 2005. Top vendors include MEDITECH (24.46 percent), McKesson (19.92 percent) and Siemens (12.31 percent). Eclipsys Corp., CPSI, Healthcare Management Systems, Inc., Dairyland Healthcare Solutions, ACS Healthcare Solutions and QuadraMed round out the top 10. Each of these vendors holds between 5.98 and 1.74 percent of the market.

In addition, 8.97 percent of the market uses self-developed applications.

In 2005, 3,597 hospitals had either installed benefits administration software or had signed a contract to do so. This represents 89.70 percent of the hospitals tracked in the sample, compared to 84.93 percent in 1998.

- ACS made its first appearance in the top 10 in 2005, after being in the bottom half of the top 20 since 2002.
- 3M and Keane have lost market share since 1998, falling into 15th place and 12th place, respectively, in 2005.
- While there has been movement among individual companies in and out of the top 10, the aggregate market strength of the largest case mix management vendors held relatively steady between 1998 and 2005. Top 10 companies held 84.62 percent of the market in 1998, compared to 85.67 in 2005.
- Top 10 vendors' aggregate share spiked in 1999 at 87.42 percent.

Case Mix Management
Aggregate Top Ten Vendor Market Share



Data from 1998 to 2003 comes from the Dorenfest IHDS+ Database™. Data from 2004 and 2005 comes from the HIMSS Analytics™ Database (derived from the Dorenfest IHDS+ Database™).

HIGHLIGHTS

- Of the top 10 vendors, all except Eclipsys and ACS have been on the list since 1998. Eclipsys joined the list in 1999, jumping from 19th place to fifth place, a position it has maintained for six straight years.

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COST ACCOUNTING

Vendors in this category provide software that attempts to match the exact cost of specific resources utilized with the associated revenue generating services. Examples include supplies, physical facilities costs, specific procedure costs, etc.

The top 10 benefits cost accounting suppliers represented 83.68 percent of the market in 2005. Top vendors include McKesson (19.77 percent), MEDITECH (16.65 percent), and Eclipsys (9.79 percent). Eclipsys, Siemens, CPSI, Lawson, Healthcare Management Solutions, Avega Health Systems and Dairyland Healthcare round out of the top 10. Each of these vendors holds between 5.98 and 2.25 percent of the market. In addition, 13.75 percent of the market uses self-developed applications, making it the third most popular solution for this application.

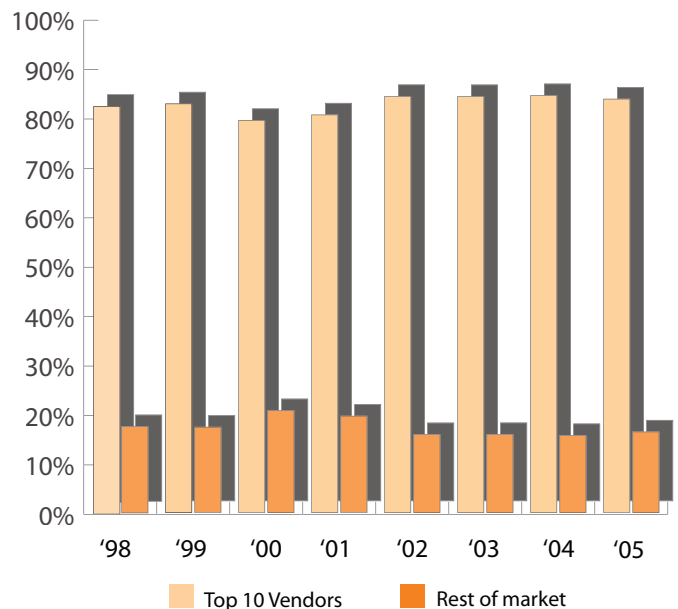
In 2005, 3,320 hospitals had either installed cost accounting software or had signed a contract to do so. This represents 82.79 percent of the hospitals tracked in the sample, compared to 69.21 percent in 1998.

- Utilization of self-developed applications have fluctuated over the past seven years, falling as low as 6.06 percent of the market in 1999, and rising as high as 14.85 percent in 2003. However, self-developed applications have never dropped lower than fifth place on the cost accounting systems top 10 list.
- Avega Health Systems (formerly Healthcare Microsystems) has held a spot on the top 10 list since 1998, fluctuating between the sixth and ninth positions. Since 2004, CPSI and Lawson have gained the largest market share.
- The year 2000 was the only time between 1998 and 2005 that the top 10 vendors controlled less than a combined 80 percent of the cost accounting market segment.

HIGHLIGHTS

- McKesson (formerly HBOC) has led consistently over the past seven years. But its share has remained relatively static—ranging from 19.77 to 23.36 percent—while the segment itself has grown substantially.

Cost Accounting
Aggregate Top Ten Vendor Market Share



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CREDIT/COLLECTIONS

Vendors in this category provide software that manages the collection of billed services and debt. This application may automatically produce letters for overdue accounts and record collection data and terms of payments.

The top 10 credit/collections suppliers accounted for 87.41 percent of the market in 2005. Top vendors include MEDITECH (20.85 percent), McKesson (18.46 percent) and Siemens (17.10 percent). CPSI, Healthcare Management Systems, IDX, Cerner Corp., Dairyland Healthcare and QuadraMed round out the top 10. Each of these vendors holds between 4.80 and 1.90 percent of the market. In addition, 12.27 percent of the market uses self-developed applications.

In 2005, 3,711 hospitals had either installed credit/collections software or had signed a contract to do so. This represents 92.54 percent of the hospitals tracked in the sample, compared to 79.44 percent in 1998.

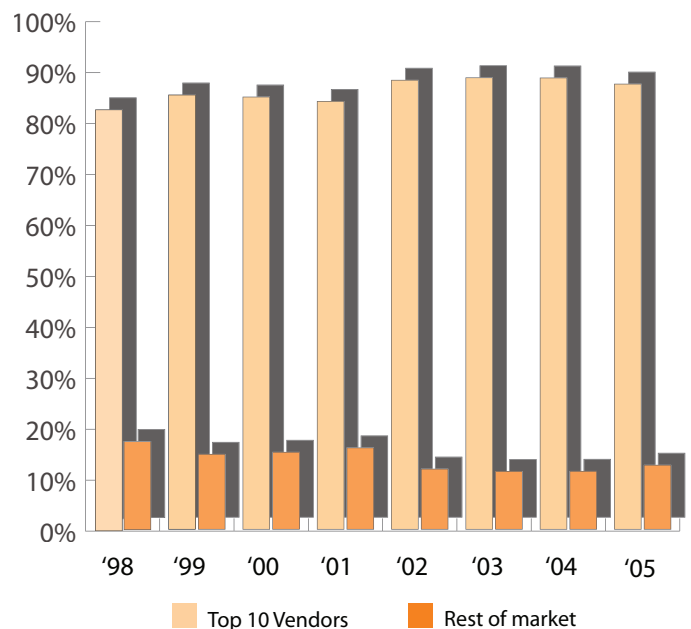
in the number one slot for six years.

- Though maintaining a place among the top 10 vendors, QuadraMed controlled less than 2 percent of the credit/collections market in 2005. In fact, it had only two more hospital installations than 11th place Epic Systems.
- The market penetration of the top 10 credit/collections vendors peaked in 2003 and 2004, when the top vendors' market share surpassed 88.60 percent. They fell back slightly in 2005.
- Top 10 vendors saw a slight dip in their fortunes in 2005, controlling slightly less of the market (87.41 percent) than they held during the prior three years. But that's less than a 1 percentage point aggregate shift.

HIGHLIGHTS

- The credit/collections top 10 list has been stable. The only newcomer to the list is Cerner, which moved into eighth position in 2005 after three years of being just a few places short of the top 10.
- In 2005, MEDITECH took over as the top vendor in the category. McKesson had been

Credit/Collections
Aggregate Top Ten Vendor Market Share



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ELECTRONIC CLAIMS

Electronic claims vendors offer software that provides electronic transactions for eligibility, authorizations and referrals. They help automate the collection process from all types of physicians, dentists, other professional providers, healthcare facilities, independent laboratories, vision care, ambulance services and suppliers.

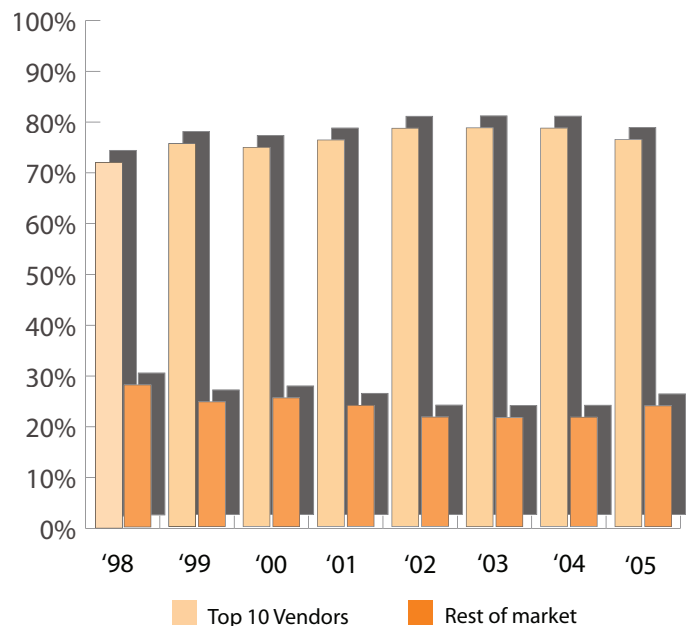
The top 10 electronic claims software suppliers accounted for 76.23 percent of the market in 2005. Top vendors include SSI Group (13.76 percent) MEDITECH (12.08 percent), McKesson (10.04 percent) and Siemens (9.31 percent). NDC, Blue Cross Blue Shield Association, CPSI, Dairyland Healthcare and IDX round out the top 10. Each of these vendors holds between 8.35 percent and 1.71 percent of the market. In addition, 10.37 percent of the market uses self-developed applications.

In 2005, 3,830 hospitals had either installed electronic claims software or had signed a contract to do so. This represents 95.51 percent of the hospitals tracked in the sample, compared to 86.06 percent in 1998.

management and does not appear in many other categories, unlike its competitors.

- Self-developed applications occupied the number three slot four of the past seven years.
- This category has the smallest aggregate market share among top 10 vendors in any of the 12 financial systems categories. The market share of the top 10 declined in 2005 to 76.23 percent after being above 78 percent for three consecutive years.
- Combined, non-top 10 vendors owned 23.77 percent of the market in 2005, narrowly missing the one-quarter mark. The last time these vendors combined to control 25 percent of the market was in 2000.

Electronic Claims
Aggregate Top Ten Vendor Market Share



Data from 1998 to 2003 comes from the Dorenfest IHDS+ Database™. Data from 2004 and 2005 comes from the HIMSS Analytics™ Database (derived from the Dorenfest IHDS+ Database™).

HIGHLIGHTS

- The SSI Group reached the top position for the first time in 2005 after several years in fifth position. It acquired National EDI Systems Corp. in 2004.
- SSI Group specializes in electronic claims

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EXECUTIVE INFORMATION SYSTEMS

Vendors in this category offer applications that provide sophisticated tools to integrate, process, and present key operational performance data to executives in an easy-to-learn format. These systems may provide cost, budget, facility utilization, staffing ratios, or revenue and profit figures.

Fully 21.71 percent of the market uses self-developed applications, while the overall top 10 executive information systems suppliers accounted for 87.43 percent of the market in 2005. Top vendors include MEDITECH (20.23 percent), McKesson (16.99 percent) and Siemens (7.50 percent).

Eclipsys, CPSI, Healthcare Management, Hyperion Solutions and Dairyland Healthcare round out the top 10. Each holds between 6.33 and 1.56 percent of the market.

In 2005, 2,543 hospitals had either installed executive information systems software or had signed a contract to do so. This represents 63.42 percent of the hospitals tracked in the sample, compared to 47.58 percent in 1998.

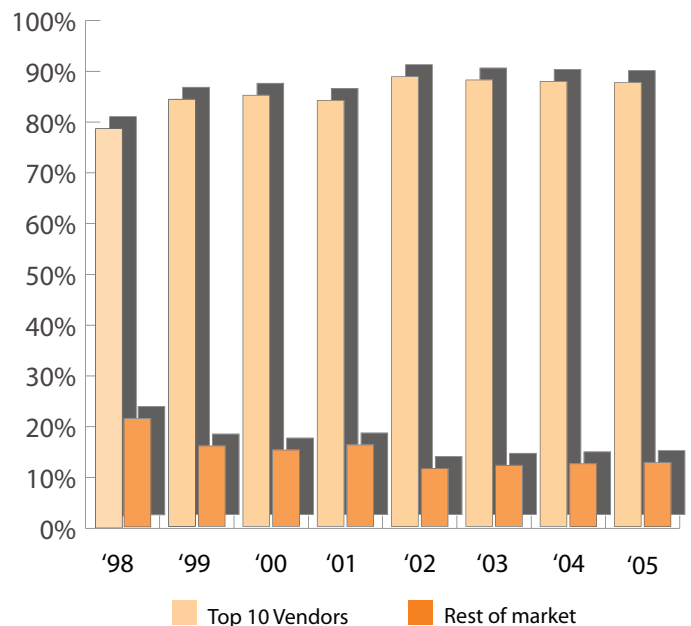
of Lawson—the list has largely retained the same names. QuadraMed, after several years in the 10th spot, dropped to 13th place in 2005.

- The top 10 executive information systems vendors controlled less than 80 percent of the executive information systems market in 1998. But they have since gained market share, reaching an aggregate peak of 88.58 percent in 2002, before leveling off.
- Self-developed applications topped the list in 1998, but fell to third place behind MEDITECH and McKesson in 1999 and 2000. However, these noncommercial applications rebounded to number one in the segment in 2001, and have continued to hold down the top ranking since that time.

HIGHLIGHTS

- Lawson joined the top 10 in 2005, with 40 hospital installations and a 1.56 percent share of the segment. It first appeared in the top 20 in 2000, when it had just 24 installations.
- For the past three years—with the exception

Executive Information Systems
Aggregate Top Ten Vendor Market Share



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GENERAL LEDGER

These vendors provide software that automates general ledger accounting and provides the information necessary for financial analysis and planning. It aids healthcare organizations in the management of the chart of accounts. It may be an application component of an enterprise resource planning suite.

The top 10 general ledger suppliers accounted for 85.07 percent of the market in 2005. Top vendors include MEDITECH (16.91 percent), Lawson (16.70 percent) and McKesson Provider Technologies (11.68 percent). Siemens Medical Solution, PeopleSoft, CPSI, Healthcare Management Systems Inc., GEAC and SAP Healthcare round out the top 10. Each holds between 7.69 and 2.77 percent of the market. Fully 12.39 percent of the market uses self-developed applications.

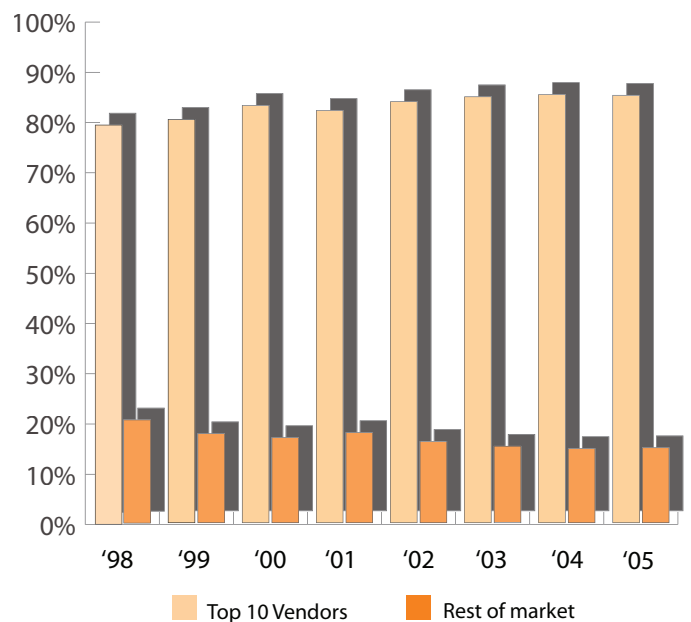
In 2005, 3,920 hospitals had either installed general ledger software or had signed a contract to do so. This represents 97.76 percent of the hospitals tracked in the sample—the second highest of any application—compared to 93.96 percent in 1998.

- The list has largely remained the same for a number of years. Dairyland Healthcare fell off the top 10 list in 2005 after seven straight years before moving to 11th place; Global Software Inc. had been on the list for four years before dropping off in 2003.
- SAP joined the top 10 list in 2005, with 2.77 percent of the market. It first appeared in the top 20 in 1999, when it possessed less than a 0.5 percent share.
- Self-developed applications have followed a counter-intuitive path, falling to as low as sixth place on the top 10 list in 1999, before rising back up to third place in 2002. Self-developed applications have retained that number three position for the past five years.

HIGHLIGHTS

- MEDITECH has maintained the number one position for seven years.
- In 2002 Healthcare Management advanced from 15th to eighth place.

General Ledger
Aggregate Top Ten Vendor Market Share



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MATERIALS MANAGEMENT

Vendors in this category offer software that supports the procurement and inventory functions for all hospital departments and operations.

The top 10 materials management suppliers accounted for 84.06 percent of the market in 2005. Top vendors include McKesson Provider Technologies (18.97 percent), Lawson (17.42 percent) and MEDITECH (15.79 percent).

Siemens Medical Solution, PeopleSoft, CPSI, Healthcare Management Systems Inc., Dairyland Healthcare Solutions and Choice Systems Inc. round out the top 10. Each holds between 5.06 and 2.22 percent of the market. Another 10.05 percent of the market uses self-developed applications.

In 2005, 3,829 hospitals had either installed materials management software or had signed a contract to do so.

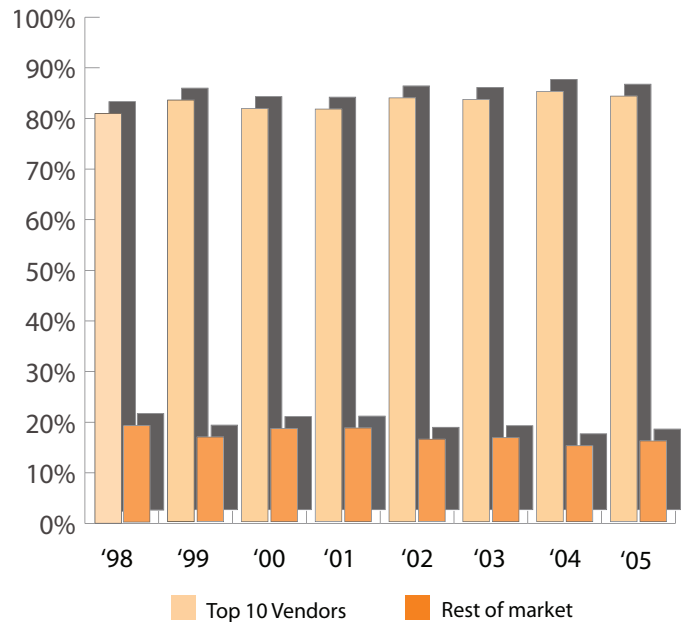
This represents 95.55 percent of the hospitals tracked in the sample, compared to 89.65 percent in 1998.

- Choice Systems joined the top 10—ranking in the 10th spot—in 2005. GEAC, for the first time since 1998, tumbled out of the top 10 and into 14th place.
- Self-developed applications are strong in this market segment, holding a fourth place position for the past four years.
- Lawson has made steady progress in this market over the past several years. In 1998, Lawson held 4.88 percent of the market; in 2005, it held 17.42 percent of the segment.
- The top 10 materials management vendors have consistently held between 80 percent and 85 percent of the market.

HIGHLIGHTS

- McKesson has been in the first position for seven straight years. Nine other companies have appeared on the top 10 list for the past four years.

Materials Management
Aggregate Top Ten Vendor Market Share



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PATIENT BILLING

These applications automate institutional and professional billing inpatient and outpatient services and discharged accounts receivable. They automate billing and collection procedures daily, thus providing information in areas such as posting and audit, billing receivable management, and revenue and management reporting.

The top 10 patient billing suppliers accounted for 89.84 percent of the market in 2005. Top vendors include MEDITECH (21.01 percent), McKesson Provider Technologies (20.25 percent) and Siemens Medical Solutions (19.01 percent). CPSI, Healthcare Management Systems Inc., IDX, Dairyland Healthcare Solutions, Cerner Corp. and Epic Systems Corp. round out the top 10. Each holds between 4.64 and 2.13 percent of the market. Additionally, another 10.72 percent of the market uses self-developed applications.

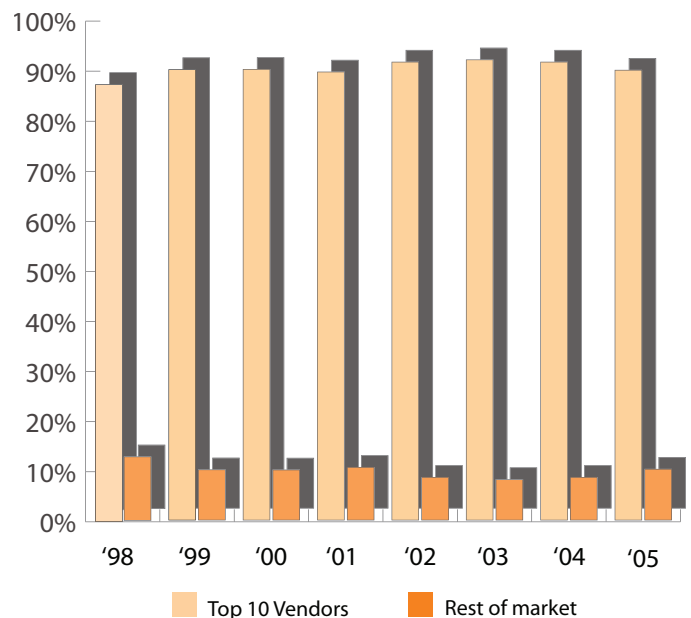
In 2005, 3,915 hospitals had either installed patient billing software or had signed a contract to do so. This represents 97.63 percent of the hospitals tracked in the sample, compared to 87.29 percent in 1998.

- Cerner and Epic joined the top 10 in 2005 after several years in the 11th and 15th spots.
- QuadraMed dropped to 11th in 2005 after six years in the top 10; Keane dropped to 12th place in 2005 after seven years on the top 10.
- Non-top 10 vendors are dominated in the patient billing segment as in no other financial systems market. The dominant top 10 vendors lost their 90 percent market share in 2004, but just barely. In 2005, top 10 suppliers controlled fully 89.84 percent of the market.
- Self-developed software use peaked in 1998, at 13.75 percent. It declined to 7.55 percent in 1999, but rose to 10.72 percent in 2005.

HIGHLIGHTS

- MEDITECH took the number one spot in 2005 after McKesson held it for six of the past eight years.

Patient Billing
Aggregate Top Ten Vendor Market Share



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PAYROLL

Vendors in this category offer software that manages payroll processing. This application keeps records of all employees for timely compensation payment and processes employees' paychecks.

The top 10 payroll system suppliers accounted for 78.55 percent of the market in 2005. Top vendors include Lawson Software (20.37 percent), MEDITECH (14.97 percent) and PeopleSoft (11.28 percent).

McKesson Provider Technologies, Siemens Medical Solutions, Automatic Data Processing, CPSI, Healthcare Management Systems Inc. and SSA Global Technologies Inc. round out the top 10. Each holds between 6.45 and 2.66 percent of the market. Another 6.30 percent of the market uses self-developed applications.

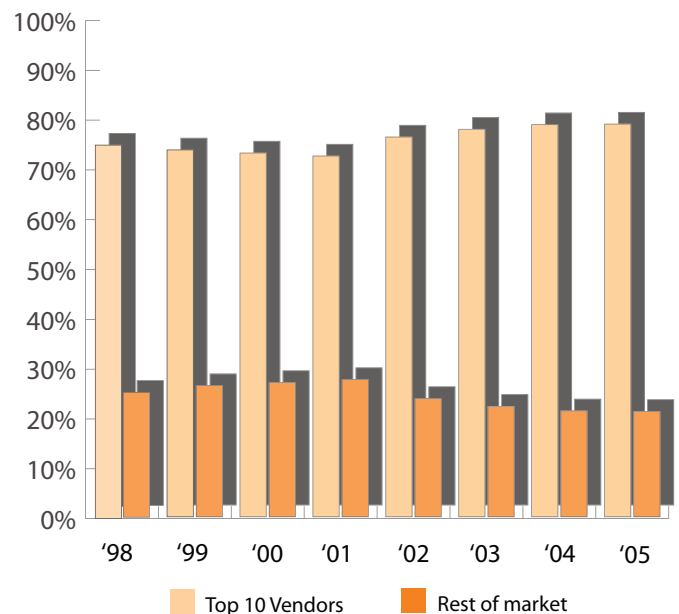
In 2005, 3,941 hospitals had either installed patient billing software or had signed a contract to do so. This represents 98.28 percent of the hospitals tracked in the sample, compared to 95.45 percent in 1998.

- Unusual among the financial systems categories, the top 10 payroll system vendors steadily lost market share between 1998 and 2001.
- Those fortunes reversed in 2002, at the same time that Lawson Software doubled its own share of sales from the previous year, landing it in the top slot where it has remained.
- The number of hospitals using self-developed applications has declined by nearly half since 1998, when 12.72 percent of hospitals developed their own solutions.
- In 2005, only 6.30 percent of hospitals utilized self-developed payroll systems.

HIGHLIGHTS

- For the past three years the top 10 list has involved the same companies.
- Only two new companies have joined the top 10 since 2001 – Healthcare Management, in 2002, and SSA Global, in 2003.

Payroll
Aggregate Top Ten Vendor Market Share



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REGISTRATION/ADT

These are applications that automate the hospital's patient registration function in an online, real-time mode. The system includes online census, preregistration, patient history, patient admission, discharge, and admission discharge transfer functions.

The top 10 registration/ADT system suppliers accounted for 89.37 percent of the market in 2005. Top vendors include MEDITECH (26.20 percent), McKesson Provider Technologies (18.97 percent) and Siemens (17.38 percent). Cerner Corp., CPSI, Healthcare Management Systems Inc., IDX, Epic Systems Corp., and Dairyland Healthcare Solutions round out the top 10. Each holds between 4.89 and 2.80 percent of the market. Another 4.08 percent of the market uses self-developed applications.

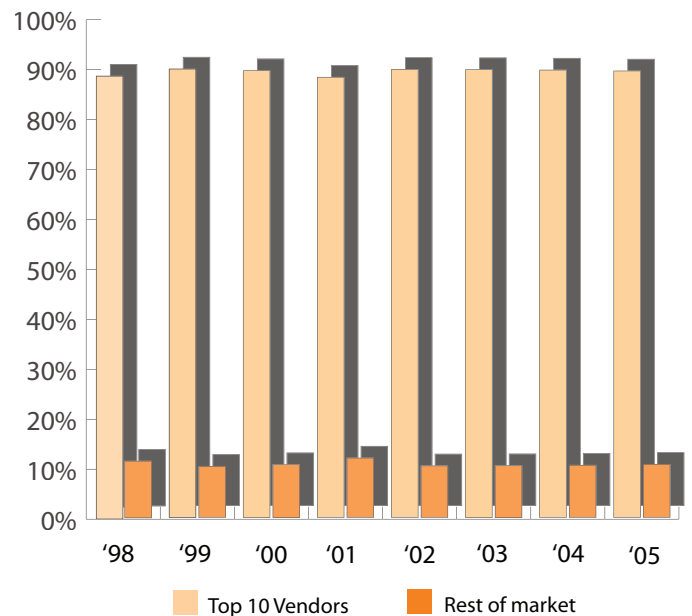
In 2005, 3,941 hospitals had either installed patient billing software or had signed a contract to do so. This represents 98.28 percent of the hospitals tracked in the sample, compared to 95.45 percent in 1998.

- The registration/ADT market has remained remarkably static over the years surveyed in this report. The top 10 registration/ADT vendors controlled 88.65 percent of the market in 1998, and 89.37 percent in 2005. There has never been a fluctuation as great as 2 percent during the intervening years.
- MEDITECH, McKesson and Siemens dominate, collectively holding 62.55 percent of the market. There is a sizable gap between Siemens and the remaining vendors in the top 10, none of which has more than 5 percent.
- Self-developed applications are in decline. In 2005, they represented just a 4.08 percent share, down from 8.48 percent in 1999.

HIGHLIGHTS

- The only newcomer to the top 10 in the past several years has been Epic, which captured ninth place in 2005 with 2.87 percent of the market. Cerner Corp. joined the list in 2002.
- In 2005, Eclipsys fell off the top 10 list for the first time since 1998. Last year, Eclipsys dropped to 12th place.

Registration/ADT
Aggregate Top Ten Vendor Market Share



Data from 1998 to 2003 comes from the Dorenfest IHDS+ Database™. Data from 2004 and 2005 comes from the HIMSS Analytics™ Database (derived from the Dorenfest IHDS+ Database™).



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