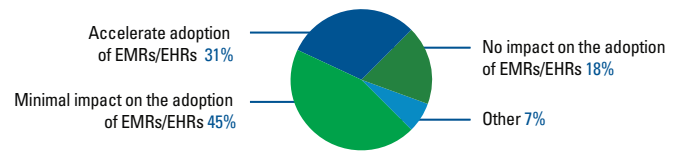


Summary

In March 2007, a healthcare IT vendor announced that it will use Google's AdSense program to help sponsor free online electronic medical records for physicians. Nearly half of respondents indicated this would have only minimal impact on future adoption of IT by physicians. Respondents expressed concerns about both the privacy of their data and about healthcare quality. In fact, nearly two-thirds of respondents noted they would be uncomfortable having their personal medical information stored in this type of model.

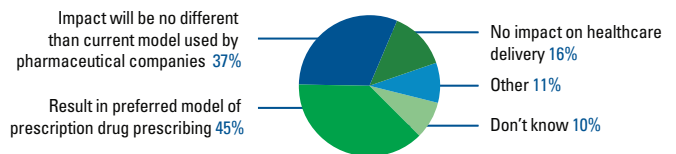
Impact of Ad-Sponsored EMRs/EHRs on Physician Utilization

Recently, a healthcare IT vendor announced it was providing free EMR/EHR software to physicians. This software would be underwritten using Google's AdSense program. Nearly half of respondents indicated offering electronic medical records underwritten by advertising dollars will have only a minimal impact on the adoption of EMRs/EHRs.



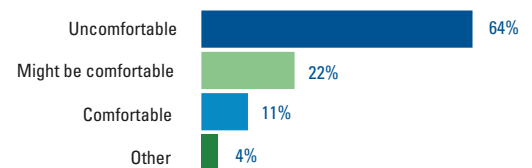
Impact on Quality of Healthcare Delivery

Physicians who use this program will see ads related to certain keywords/phrases associated with a particular patient record. Pharmaceutical companies are predicted to be a key group to use this type of advertising. While nearly half of the respondents indicated this will result in a preferred model of prescription drug prescribing, another third said this type of advertising would be no different than current models of advertising used by pharmaceutical companies (such as free samples to physicians).



Impact on Privacy & Security of Data

Nearly two-thirds of respondents indicated that, as consumers, they would not be comfortable having their medical information stored in this type of medical record. In fact, only 11 percent of respondents said they would be comfortable having their personal medical information in this type of medical record.



Donation of IT to Affiliated Physicians: Stark Relaxation

Recent exceptions to Stark and anti-kickback regulations have given hospitals the green light to donate IT to affiliated physicians. Two-thirds of the respondents did not work for an organization that is in a position to provide technology to physicians (i.e., vendor organization). Among those working for a provider organization, only eight percent of hospitals have donated IT to affiliated physicians. Nearly twice that percent have not done so because they are concerned about how IRS regulations will impact their not-for profit status.

