

WINTERGREEN RESEARCH, INC.

**Electronic Medical Record Market Opportunities,
Strategies, and Forecasts 2007 to 2013**

Electronic Medical Record



Picture by Susie Eustis

MOUNTAINS OF OPPORTUNITY

**WinterGreen Research, Inc.
Lexington, Massachusetts**

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CHECK OUT THESE KEY TOPICS

REPORT # SH29821542 389 PAGES 118 TABLES AND FIGURES 2007 \$3,200

*MARKET FOR HEALTHCARE ELECTRONIC PATIENT RECORD
Enterprise Electronic Medical Record (EMR) Market
Forecasts*

**Healthcare Information Technology (HIT) Marketplace
Electronic Medical Records (EMR)**

Electronic Medical Records Systems Benefits
Healthcare Information Systems Strategy

INFORMATION SYSTEM SOFTWARE MARKET SHIFTS

CLINICAL DATA REPOSITORY

HEALTHCARE AND HEALTHCARE IT INDUSTRY

HOSPITAL AND PHYSICIAN PRACTICE MARKET CONDITIONS

HEALTHCARE INFORMATION TECHNOLOGY MARKET

HOSPITAL INFORMATION SOFTWARE TECHNOLOGY

SOA ENGINES

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JAVA

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Electronic Medical Record Market Description, Market Analysis, Product Description, and Company Profiles

Efficient automated process implementation is supported by Electronic Medical Record (EMR). EMR software solutions are used to support software developed in-house to enable the rapid construction of Web portals and other Web-based systems. Typical implementations are related to systems running on a mixed group of servers, under different operating systems.

Packaged applications efficiently accomplish the basic functions needed for electronic medical record systems implementation. Business processes are automated using EMR systems. Further EMR functionality is achieved via extract, transform, and load functions.

Enterprise electronic medical record (EMR) market forecast analysis indicates that the future of care delivery depends on automation of process. The ability to quickly get a picture of patient condition depends on dashboards prepared by the primary care physician that quickly illustrate any noteworthy conditions that a patient may present.

The cost for the packaged electronic medical record (EMR) systems for a large teaching hospital is \$1.95 million. The number sold at 126 in 2006 is anticipated to grow to 177 in 2013. The replacement cycle is generally six years for these electronic medical record (EMR) systems packages. Rather than rip and replace, systems tend to be upgraded to new versions.

Electronic medical record markets are very significant. All facilities and all medical practices need to move to automated process that replaces manual handling of written patient records. The top 800 facilities worldwide are anticipated to spend hundreds of millions of dollars each to implement electronic patient records. While a lot of that spending will be on proprietary software, a lot of it will be for packaged software solutions.

The total number of electronic medical record (EMR) systems is heavily weighted toward the mid range systems as most facilities and practices consolidate into a size of organization that can afford a team of computing IT managers dedicated to systems automation. Medical organizations have long resisted automation of process, but they can no longer sustain that attitude.

Dashboards are used to run businesses, they provide a way to condense information and highlight trends that need attention. Migration of this technology to care delivery is anticipated to be rapid because it is leveraging existing technology from business to make it useful in the health care delivery arena. The dashboards are useful because they provide a way to condense a range of different types on information into a visually presentation.

Dashboards include powerful, real-time analytics to provide comprehensive visibility across the entire patient profile. With quick access to up-to-the-minute information, clinicians can make decisions with speed and confidence. in-memory technology is changing the electronic medical record market, providing the next generation of speed, flexibility, and ease of use.

Electronic Medical Record Dashboards Make Clinicians More Productive

The advantage is that all of the features of automated electronic medical record process, none of the limitations of traditional hand written patient records are implemented as automated dashboard solutions.

With electronic medical record dashboards long, complex, and expensive software implementations are by passed by a dashboard that combines analytics and diagnostic images available via a click. Dashboards containing all of the patients relevant metrics, with data from all of the facility relevant data sources can be built in 10 days. With electronic medical record dashboards, solutions can be deployed in days, and users can be trained in minutes.

Enterprise electronic medical record (EMR) market forecast analysis indicates that the future of care delivery depends on automation of process. The ability to quickly get a picture of patient condition depends on dashboards prepared by the primary care physician that quickly illustrate any noteworthy conditions that a patient may present.

Markets at \$1.8 billion in 2006 are anticipated to reach \$3.2 billion by 2013.

Worldwide enterprise electronic medical record (EMR) software markets will grow substantially as vendors are able to leverage the EMR expertise to provide competitive advantage from automation of process using IT infrastructure.

Companies Profiled

Market Leader

Cerner
Eclipsys
Siemens

Market Participants

CostFlex Systems	CPSI
Epic	GE / IDX / Centricity
Hyperion Solutions	iSoft
Kodak Health Group	Lawson
Misys Healthcare Systems	Meditech
mTuitive	QuadraMed
SCC Soft Computer	

Electronic Medical Record Systems Strategies and Forecasts 2007-2013

REPORT METHODOLOGY

THIS IS THE 318TH REPORT IN A SERIES OF MARKET RESEARCH REPORTS THAT PROVIDE FORECASTS IN COMMUNICATIONS, TELECOMMUNICATIONS, THE INTERNET, COMPUTER, SOFTWARE, TELEPHONE EQUIPMENT, HEALTH EQUIPMENT, AND ENERGY. THE PROJECT LEADERS TAKE DIRECT RESPONSIBILITY FOR WRITING AND PREPARING EACH REPORT. THEY HAVE SIGNIFICANT EXPERIENCE PREPARING INDUSTRY STUDIES. FORECASTS ARE BASED ON PRIMARY RESEARCH AND PROPRIETARY DATA BASES. FORECASTS REFLECT ANALYSIS OF THE MARKET TRENDS IN THE SEGMENT AND RELATED SEGMENTS. UNIT AND DOLLAR SHIPMENTS ARE ANALYZED THROUGH CONSIDERATION OF DOLLAR VOLUME OF EACH MARKET PARTICIPATION IN THE SEGMENT. INSTALLED BASE ANALYSIS AND UNIT ANALYSIS IS BASED ON INTERVIEWS AND AN INFORMATION SEARCH. MARKET SHARE ANALYSIS INCLUDES CONVERSATIONS WITH KEY CUSTOMERS OF PRODUCTS, INDUSTRY SEGMENT LEADERS, MARKETING DIRECTORS, DISTRIBUTORS, LEADING MARKET PARTICIPANTS, OPINION LEADERS, AND COMPANIES SEEKING TO DEVELOP MEASURABLE MARKET SHARE. OVER 200 IN DEPTH INTERVIEWS ARE CONDUCTED FOR EACH REPORT WITH A BROAD RANGE OF KEY PARTICIPANTS AND INDUSTRY LEADERS IN THE MARKET SEGMENT. WE ESTABLISH ACCURATE MARKET FORECASTS BASED ON ECONOMIC AND MARKET CONDITIONS AS A BASE. USE INPUT/OUTPUT RATIOS, FLOW CHARTS, AND OTHER ECONOMIC METHODS TO QUANTIFY DATA. USE IN-HOUSE ANALYSTS WHO MEET STRINGENT QUALITY STANDARDS. INTERVIEWING KEY INDUSTRY PARTICIPANTS, EXPERTS AND END-USERS. OUR RESEARCH INCLUDES ACCESS TO LARGE PROPRIETARY DATABASES. LITERATURE SEARCH INCLUDES ANALYSIS OF TRADE PUBLICATIONS, GOVERNMENT REPORTS, AND CORPORATE LITERATURE.

YOU MUST HAVE THIS STUDY

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Electronic Medical Record Strategies and Forecasts 2007 to 2013

Table of Contents

WORLDWIDE ELECTRONIC MEDICAL RECORD MARKET EXECUTIVE SUMMARY

WORLDWIDE ELECTRONIC MEDICAL RECORD MARKET EXECUTIVE SUMMARY	ES-1
Market For Healthcare Electronic Patient Record	ES-1
Packaged Electronic Medical Record (EMR) Systems	ES-1
Electronic Medical Record Dashboards	ES-2
Electronic Medical Record Dashboards Make Clinicians More Productive	ES-2
Hospital Electronic Patient Record Solutions Market	ES-3
Use Of The Mainframe Accelerated	ES-6
Healthcare Electronic Patient Records Market Shares	ES-6
Enterprise Electronic Medical Record (EMR) Market Dollar Forecasts	ES-8

ENTERPRISE MEDICAL RECORDS INFORMATION SYSTEMS MARKET DESCRIPTION AND MARKET DYNAMICS

1. ELECTRONIC MEDICAL RECORDS INFORMATION SYSTEMS MARKET DESCRIPTION AND MARKET DYNAMICS	1-1
1.1 Healthcare Information Technology (HIT) Marketplace	1-1
1.1.1 The Healthcare and Healthcare IT Industry	1-1
1.1.2 Trends Toward Homecare	1-2
1.1.3 Policy Reforms	1-3
1.1.4 Private Sector Approaches	1-3
1.2 Electronic Medical Records (EMR)	1-4
1.2.1 Electronic Medical Records EMR Major Purchasing Decisions	1-4
1.2.2 Electronic Medical Records Software Back up and Storage Features	1-5
1.3 Online Medical Systems	1-6
1.4 Electronic Medical Records Systems Benefits	1-7
1.5 Healthcare Information Systems Vision of Automated Process for Healthcare Delivery	1-9
1.5.1 Connect the Person	1-9
1.5.2 Cerner Offers A Longitudinal, Person-Centric Electronic Medical Record	1-10
1.5.3 Structure the Knowledge	1-10
1.6 Healthcare Information Systems Strategy	1-10
1.6.1 Hospital Laboratory Information Systems Positioning	1-11
1.7 Information System Software Market Shifts	1-11
1.7.1 Characteristics Particular To The Laboratory Information System Market	1-15
1.7.2 Implementation Depends On Documentation Of Each Discipline Needs	1-15
1.7.3 Prospective Payment System (PPS)	1-16
1.7.4 Managed Care Requirements	1-16
1.7.5 Oasis Laboratory Health Agencies	1-19

ELECTRONIC MEDICAL RECORD EMR INFORMATION SYSTEMS MARKET SHARES AND MARKET FORECASTS

2. ELECTRONIC MEDICAL RECORD EMR INFORMATION SYSTEMS MARKET SHARES AND MARKET FORECASTS	2-1
2.1 Market For Electronic Medical Record	2-1
2.2 Market For Electronic Medical Records	2-4

2.2.1	Market For Healthcare Electronic Patient Records Market Shares	2-4
2.2.2	Enterprise Electronic Medical Record (EMR) Market Dollar Forecasts	2-7
2.2.3	Enterprise Electronic Medical Record (EMR) Market Unit Forecasts	2-10
2.2.4	Electronic Medical Record Dashboards	2-25
2.2.5	Electronic Medical Record Dashboards Make Clinicians More Productive	2-25
2.3	Hospital Information Systems: Chart Deficiency Markets	2-26
2.3.1	Hospital Information Systems: Chart Deficiency Market Shares	2-27
2.3.2	Cerner	2-30
2.3.3	McKesson	2-30
2.3.4	Siemens	2-31
2.3.5	Chart Deficiency Systems Market Forecasts	2-31
2.4	Hospital Information Systems Chart Tracking Software	2-35
2.4.1	Hospital Information Systems Chart Tracking Software Market Shares	2-36
2.4.2	Hospital Information Systems Chart Tracking Software Market Forecasts	2-39
2.5	Clinical Data Repository	2-43
2.5.1	Clinical Data Repository Market Shares	2-43
2.5.2	Clinical Data Repository Market Forecasts	2-46
2.6	Clinical Decision Report Markets	2-49
2.6.1	Clinical Decision Report Market Shares	2-49
2.6.2	Clinical Decision Report Market Forecasts	2-52

ELECTRONIC MEDICAL RECORD PRODUCT DESCRIPTION

3. ELECTRONIC MEDICAL RECORD PRODUCT DESCRIPTION	3-1
3.1	McKesson Horizon Patient Electronic Record 3-1
3.1.1	McKesson Horizon Performance Manager 3-4
3.1.2	McKesson Horizon Patient Portal 3-6
3.1.3	McKesson Pathways Regulatory Guidelines Compliance Advisor 3-9
3.1.4	McKesson Pathways Contract Management 3-11
3.1.5	McKesson Pathways Contract Management Denial and Appeal Analysis Module 3-13
3.1.6	McKesson Electronic Health Record Practice Point Chart 3-15
3.1.7	McKesson Transaction Solutions Hub 3-18
3.1.8	McKesson Telehealth Monitoring Application 3-18
3.1.9	McKesson Horizon Web and Portal Healthcare Delivery Business Insight 3-22
3.1.10	McKesson Horizon Distance Learning 3-24
3.2	Meditech Enterprise Medical Record 3-25
3.2.1	Meditech Current Care/Clinical Information 3-28
3.2.2	Meditech Historical Patient Data 3-29
3.2.3	Meditech Confidential Records of Care 3-30
3.2.4	Meditech Electronic Medical Record Patient Care 3-30
3.2.5	Meditech Patient-Oriented Profiles 3-34
3.2.6	Meditech Enterprise Medical Record Patient Care System 3-39
3.2.7	Meditech Patient Care Management 3-41
3.2.8	Meditech Patient Care Management Clinical Content 3-42
3.2.9	Meditech Documentation of Patient Information 3-44
3.2.10	Meditech Reporting and Printing Capabilities 3-47
3.2.11	Meditech Enterprise Patient Index EPI and Medical Records 3-49
3.2.12	MediTech Enterprise Medical Record 3-59
3.2.13	Meditech Electronic Medical Record Patient Care Inquiry 3-63
3.2.14	MediTech Patient-Oriented Profiles 3-66
3.3	Cerner Millennium Proactive Decision Support 3-69
3.3.1	Cerner Intuition EMR Increases Reimbursement 3-72
3.3.2	Cerner Intuition EMR Optimize Administrative Efficiency 3-72
3.3.3	Cerner Knowledge-Driven Care 3-74
3.3.4	Cerner Executable Knowledge® 3-74
3.3.5	Cerner Knowledge Infrastructure 3-74
3.3.6	Cerner Outcomes Management 3-75
3.3.7	Cerner Regulatory Outcomes 3-76
3.3.8	Cerner Operational Outcomes 3-76

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3.3.9	Cerner Knowledge Solutions	3-78
3.3.10	Cerner CMT Maps Clinical Concepts To Cerner Knowledge Index	3-81
3.3.11	Cerner IQHealth® Consumer Solution	3-83
3.4	Eclipsys Sunrise Health Information Record Manager	3-84
3.4.1	Eclipsys Sunrise™ eLink Enterprise Application Integration	3-87
3.4.2	Eclipsys Sunrise™ eLink Enterprise Application Integration EAI Platform Support	3-88
3.4.3	Eclipsys Sunrise™ eLink Enterprise Application Integration EAI Data Definition	3-89
3.4.4	Eclipsys EMR	3-89
3.4.5	Eclipsys Sunrise Access Manager/	3-90
3.5	iSOFT Lorenzo Patient Care Systems	3-91
3.5.1	iSOFT Lorenzo Based on International Standards And Open Technologies	3-92
3.5.2	iSoft LORENZO Services	3-95
3.6	Epic Systems	3-96
3.6.1	Epic Systems EHealth Medical Record	3-96
3.6.2	EpicCare Ambulatory EMR	3-97
3.6.3	EpicCare Paper / Electronic Records Management	3-100
3.7	GE Centricity® Physician Office - Electronic Medical Records (EMR)	3-104
3.7.1	IDX / First DataBank Drug Knowledge Base	3-106
3.8	Carecast Patient Education, Powered By LOGICARE®	3-107
3.8.1	Carecast Discharge Instructions, powered by LOGICARE®	3-107
3.8.2	Patient Information and Alerts / Patient List Management	3-107
3.8.3	Provider In-Box	3-108
3.8.4	Health Maintenance Alerts	3-108
3.8.5	Carecast Document Management, powered by LanVision™	3-108
3.9	Siemens Soarian® Cardiology	3-109
3.9.1	Siemens Electronic Health Record	3-110
3.9.2	Siemens MedSeries4® Repository	3-110
3.9.3	Siemens Online Medical Record	3-111
3.10	Misys Comprehensive Clinical Decision Support CPOE	3-114
3.10.1	Misys EMR: Features and Benefits	3-117
3.10.2	Misys EMR Clinical Data for Physician Practices	3-121
3.11	QuadraMed Patient Information Electronic Patient Record Access Management Solutions	3-122
3.11.1	QuadraMed Plans of Care Tailored to Patient Needs	3-124
3.11.2	QuadraMed Decision Support Next Generation CPOE	3-125
3.11.3	QuadraMed Affinity Care Management Clinical Solutions	3-126
3.11.4	QuadraMed Affinity Care Management Nursing Solutions	3-126
3.11.5	QuadraMed Decision Support	3-127
3.11.6	QuadraMed Clinical Outcome Practice Evaluator (COPE)	3-128
3.11.7	QuadraMed Benefits Meet Nursing Challenges	3-129
3.11.8	QuadraMed Decision Support	3-130
3.11.9	QuadraMed Quantim Record Management	3-131
3.11.10	Quantim Electronic Document Management	3-132
3.12	MDS Medical / Allscripts Electronic Health Records Software	3-133
3.12.1	TouchChart Base Medical Document Management	3-136
3.12.2	MDS Medical / Allscripts TouchChart™ EMR Software	3-137
3.13	CPSI Electronic Medical Record System	3-138
3.14	SOAPware	3-140
3.15	MediNotes e Electronic Medical Record Software	3-148
3.15.1	MediNotes Practice View	3-149
3.15.2	MediNotes Object View	3-150

HEALTHCARE ELECTRONIC MEDICAL RECORD (EMR) SYSTEMS TECHNOLOGY

4. HEALTHCARE ELECTRONIC MEDICAL RECORD (EMR) SYSTEMS TECHNOLOGY	4-1
4.1 Healthcare and Healthcare IT Industry	4-1
4.1.1 Regional Health Information Organizations (RHIOs)	4-1
4.1.2 HIT Earns Broad Government Recognition	4-2
4.1.3 Dramatic Hospital IT-Enabled Cost Savings	4-2

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4.1.4	Regional Health Information Organizations	4-3
4.2	Hospital and Physician Practice Market Conditions	4-5
4.2.1	Hospital Bond Rating Upgrades	4-5
4.2.2	Software Development	4-6
4.2.3	Target Marketing	4-7
4.2.4	Client Services	4-8
4.3	Healthcare Information Technology Market	4-8
4.3.1	Healthcare Industry Technology Factors	4-9
4.4	Leapfrog Group	4-11
4.5	Hospital Information Software Technology	4-12
4.6	SOA Engines	4-14
4.6.1	Transport Layer Achieves Mission Critical Functionality	4-16
4.6.2	SOA Collaborations	4-17
4.6.3	SOA Software Built Upon A Single Health Data Repository Database Model	4-18
4.6.4	Engaging The Citizen	4-19
4.6.5	Serving The Global Healthcare Community	4-19
4.6.6	Partner For Innovation	4-20
4.6.7	Re-Engineering The Healthcare Supply Chain	4-21
4.6.8	Systems Endorsed By Governments And Technology Leaders	4-22
4.6.9	Supporting Standards in the Healthcare Supply Chain	4-23
4.7	Open Systems	4-25
4.7.1	Open Web Services Technology	4-25
4.7.2	Open Standards To Define A Common Event	4-26
4.7.3	Open Systems	4-26
4.8	Service Oriented Architecture (SOA)	4-27
4.8.1	IBM Service Oriented Architecture (SOA)	4-29
4.8.2	SOA Business Challenge IT Imperative	4-29
4.8.3	Service-Oriented Architecture And Relevant Standards	4-30
4.9	Java	4-32
4.9.1	AI Vendor Commitment To Java	4-33
4.9.2	Advantages Of Java In Context Of Application Integration	4-33
4.10	J2EE (Java™ Platform)	4-34
4.10.1	Java Single Application Development	4-35
4.10.2	EAI Vendor Commitment To Java	4-36
4.10.3	Advantages Of Java In Context Of Application Integration	4-36
4.10.4	J2EE Standardization	4-37

HOSPITAL INFORMATION SYSTEM ELECTRONIC MEDICAL RECORD COMPANY PROFILES

5. HOSPITAL INFORMATION SYSTEM ELECTRONIC MEDICAL RECORD COMPANY PROFILES	5-1	
5.1	Hospital Information System Companies	5-1
5.2	HIMSS Segments:	5-3
5.2.1	HIMSS Top Companies:	5-5
5.3	Cerner	5-6
5.3.1	Cerner Automates the Care Process	5-6
5.3.2	Cerner Structure the Knowledge	5-6
5.3.3	Cerner Strategy	5-7
5.3.4	Cerner Millennium 2007 Solution and Service Highlights	5-10
5.3.5	Cerner Lights On™ Network	5-10
5.3.6	Cerner Physician Practice Business, PowerWorks®, in 2006	5-11
5.3.7	Cerner Positioning for Continued Long-Term Growth	5-12
5.3.8	Cerner Device With Connectivity Architecture For Prescription Accuracy	5-14
5.3.9	Cerner Revenue Shows Organic Growth	5-15
5.3.10	Cerner Results Overview	5-16
5.3.11	Cerner Target Markets	5-18
5.3.12	Cerner Unified Architecture	5-20
5.3.13	Cerner Nursing Solutions	5-21

WINTERGREEN RESEARCH, INC.

5.3.14	Cerner Healthcare Devices	5-21
5.3.15	Cerner Implementation and Support Services	5-22
5.3.16	Cerner Selected Differentiating Solutions	5-23
5.3.17	Cerner / Galt Associates	5-25
5.3.18	Cerner / VitalWorks	5-25
5.3.19	Cerner Regional Analysis	5-25
5.3.20	Cerner Segment Reporting	5-26
5.4	CostFlex Systems	5-27
5.4.1	CostFlex International	5-29
5.5	CPSI	5-29
5.5.1	CPSI System Product Development	5-31
5.5.2	CPSI Organizational Structure	5-31
5.5.3	Computer Programs and Systems Fourth Quarter and Year-End 2006 Revenue	5-32
5.6	Eclipsys	5-35
5.6.1	Eclipsys Revenue for Quarter Ended March 31, 2007	5-35
5.6.2	Eclipsys Revenues:	5-36
5.6.3	Eclipsys Business Overview	5-37
5.6.4	Eclipsys Target Markets	5-38
5.6.5	Eclipsys Services Oriented Architecture: Solutions Utilize The Same Architecture And Share Health Data Repository (HDR), While Being Customized For The Workflows Of Different Environments	5-39
5.6.6	Eclipsys Sunrise RIS Advanced Radiology Information System	5-40
5.6.7	Eclipsys Sunrise™Clinical Manager with Physician Solutions	5-41
5.6.8	Eclipsys Software Offerings:	5-42
5.6.9	Eclipsys Order Entry	5-42
5.6.10	Eclipsys Clinical Decision Support	5-43
5.6.11	Eclipsys Laboratory, Surgery, And Critical Care Modules ·	5-44
5.6.12	Eclipsys Patient Scheduling And Resource Management Facilitates Scheduling Patient Appointments	5-45
5.6.13	Eclipsys Sunrise Decision Support Manager	5-46
5.6.14	Eclipsys Diagnostic Imaging Solutions	5-47
5.6.15	Eclipsys Consulting Services	5-48
5.6.16	Remote Hosting	5-48
5.6.17	Eclipsys Revenue Quarter Ended March 31, 2007	5-49
5.7	Epic	5-50
5.8	GE / IDX / Centricity	5-51
5.8.1	GE Healthcare Collective Knowledge	5-51
5.8.2	GE Healthcare Revenue Cycle Management	5-51
5.8.3	GE Healthcare:	5-52
5.8.4	GE Healthcare Revenue	5-52
5.8.5	GE Healthcare Primary Business Units	5-53
5.9	Hyperion Solutions:	5-55
5.9.1	Hyperion System 9	5-56
5.9.2	Hyperion / UpStream Software	5-56
5.9.3	Hyperion Business Performance Management Demand Drivers	5-56
5.9.4	Hyperion Strategy	5-58
5.9.5	Key elements Hyperion System 9 Products	5-61
5.9.6	Hyperion System 9 Applications+	5-62
5.9.7	Hyperion System 9 BI+	5-63
5.10	iSoft:	5-64
5.10.1	iSoft Supporting Reform In Healthcare	5-66
5.10.2	Working With Professionals	5-67
5.11	Kodak Health Group	5-68
5.12	Lawson	5-69
5.12.1	Lawson Healthcare Organization Customer Base	5-70
5.12.2	Lawson S3 Enterprise Performance Management Suite	5-71
5.12.3	Lawson S3 Supply Chain Management Suite	5-72
5.12.4	Lawson S3 Human Capital Management Suite	5-73
5.12.5	Lawson S3 Enterprise Financial Management Suite	5-74

WINTERGREEN RESEARCH, INC.

5.12.6	Lawson S3 Business Process Management Suite	5-74
5.12.7	Lawson Vertical Market and Customer Focus	5-78
5.12.8	Lawson Technology Platform	5-79
5.12.9	Lawson Application Architecture	5-79
5.12.10	Lawson Products And Solutions	5-80
5.12.11	Lawson M3 Product Benefits of Solutions	5-81
5.12.12	Lawson Software Third Quarter Fiscal 2007 Revenue	5-85
5.12.13	Lawson Third Quarter Fiscal 2007 Key Metrics and Highlights	5-86
5.12.14	Lawson Software and Intentia	5-88
5.13	Misys Healthcare Systems:	5-88
5.13.1	Misys plc	5-90
5.13.2	Misys Healthcare Systems Solutions	5-90
5.13.3	Misys Product Pricing	5-94
5.13.4	Misys Marketing	5-94
5.13.5	Misys Healthcare Systems Partners With mTuitive To Better Ensure The Accuracy Of Cancer Diagnosis	5-95
5.14	Meditech	5-96
5.14.1	Meditech / Acquire Patient Care Technologies (PtCT)	5-96
5.14.2	Patient Care Technologies (PtCT) Maestro Enterprise Software	5-97
5.14.3	Meditech Revenue	5-97
5.14.4	Meditech Hospital Software	5-98
5.14.5	Meditech Computer Hardware	5-99
5.14.6	Meditech Licensed Software	5-100
5.14.7	Meditech Corporate Partner For Physician and Practice Management software LSS Improvements Focus on Quality, Integration	5-101
5.14.8	LSS Data Systems Integration is Key	5-102
5.14.9	e-Prescribing	5-102
5.14.10	Meditech Authorization and Referral Management	5-102
5.15	mTuitive	5-104
5.16	QuadraMed	5-104
5.16.1	QuadraMed Q1 2007 Revenue	5-104
5.16.2	QuadraMed Revenue	5-105
5.16.3	QuadraMed Major Customers	5-108
5.16.4	QuadraMed Revenue	5-108
5.17	SCC Soft Computer:	5-113
5.18	Siemens:	5-114
5.18.1	Siemens In-Vitro Diagnostics Market	5-118
5.18.2	Siemens Geographic Presence	5-118
5.18.3	Siemens Principal Competitors	5-119
5.18.4	Siemens / Bayer Diagnostics Unit	5-120

List of Tables and Figures**WORLDWIDE ELECTRONIC MEDICAL RECORD MARKET EXECUTIVE SUMMARY**

Table ES-1	ES-4
Healthcare Electronic Patient Record Market Driving Forces	
Table ES-2	ES-5
Healthcare Electronic Patient Record IT Solution Features	
Figure ES-3	ES-7
Healthcare Information Systems: Enterprise EPR Electronic Patient Record Market Shares, Dollars, 2006	
Figure ES-4	ES-9
Worldwide Electronic Medical Record (EMR) Systems Shipments and Services Fees, Total Dollars, Market Forecasts, 2007-2013	

ENTERPRISE MEDICAL RECORDS INFORMATION SYSTEMS MARKET DESCRIPTION AND MARKET DYNAMICS

Table 1-1	1-8
Benefits of Electronic Medical Records Software	
Table 1-2	1-12
Electronic Medical Records Systems Information System Software Characteristics	
Table 1-3	1-14
Market Characteristics For Evaluation of Electronic Medical Records Systems Information System Software Vendors	
Table 1-4	1-17
JCAHO ORYX Requirements	

ELECTRONIC MEDICAL RECORD EMR INFORMATION SYSTEMS MARKET SHARES AND MARKET FORECASTS

Table 2-1	2-2
Healthcare Electronic Medical Record Market Driving Forces	
Table 2-2	2-3
Healthcare Electronic Medical Record IT Solution Features	
Figure 2-3	2-5
Healthcare Information Systems: Enterprise EPR Electronic Patient Record Market Shares, Dollars, 2006	
Table 2-4	2-6
Healthcare Information Systems: Enterprise EPR Electronic Patient Record Market Shares, Dollars, 2006	
Figure 2-5	2-7
Worldwide Electronic Medical Record (EMR) Systems Shipments and Services Fees, Total Dollars, Market Forecasts, 2007-2013	
Figure 2-6	2-8
Worldwide Enterprise Electronic Medical Record (EMR) Systems - Large Facilities License Fees, Market Forecasts, Dollars: 2007-2013	
Figure 2-7	2-9
Worldwide Electronic Medical Record (EMR) Systems For Mid Size and Small Facilities and Physician Practices -- License Fees, Market Forecasts Shipments, Dollars: 2007-2013	

Figure 2-8	2-11
Worldwide Electronic Medical Record (EMR) Systems -- Market Forecasts Shipments, Total Number of Units, 2007-2013	
Figure 2-9	2-12
Worldwide Electronic Medical Record (EMR) Systems Hospital Facility and Physician Practice Information Systems Market Forecasts Shipments, 2007-2013	
Figure 2-10	2-14
Worldwide Hospital Facilities, Installed Base and Percent Penetration of Robust Electronic Patient Records Systems Forecasts Shipments, 2007-2013	
Figure 2-11	2-15
Worldwide Electronic Medical Record (EMR) Systems For Large Facilities -- Market Forecasts Shipments, Number of Units, 2007-2013	
Figure 2-12	2-17
Worldwide Electronic Medical Record (EMR) Systems For Large Hospitals -- Market Forecasts: Number of Units, 2007-2013	
Figure 2-13	2-18
Worldwide Electronic Medical Record (EMR) Systems For Mid Size and Small Facilities and Physician Practices -- Market Forecasts: Number of Units, 2007-2013	
Figure 2-14	2-19
Worldwide Enterprise Electronic Medical Record (EMR) Mid Size and Small Hospital Mid Range and Small Information Systems Market Forecasts, 2007-2013	
Table 2-15	2-21
Worldwide Enterprise Electronic Medical Record (EMR) Physician Group Practice Mid Range Information Systems Market Forecasts, 2007-2013	
Table 2-16	2-22
Worldwide Enterprise Practice Management System Physicians in Practices Forecasts, 2007-2013	
Table 2-17	2-23
Worldwide Enterprise Number of Physician Group Practices Forecasts, 2007-2013	
Figure 2-18	2-24
Worldwide Enterprise Number of Physician Group Practices Forecasts, 2007-2013	
Figure 2-19	2-28
Worldwide Hospital Information Systems: Chart Deficiency Market Shares, Licenses and Services, 2006	
Figure 2-20	2-29
Worldwide Hospital Information Systems: Chart Deficiency Market Shares, Licenses and Services, 2006	
Figure 2-21	2-32
Chart Deficiency: Number Of Units Shipped, Market Forecasts 2007 - 2013	
Figure 2-22	2-33
Chart Deficiency: License and Services Fees, Market Forecasts 2007 - 2013	
Figure 2-23	2-34
Worldwide Hospital Information Chart Deficiency Systems Market Forecasts 2007 – 2013	
Figure 2-24	2-37
Worldwide Hospital Information Systems: Chart Tracking/Locator Software Market Shares, 2006	
Table 2-25	2-38
Worldwide Hospital Information Systems: Chart Tracking/Locator Market Shares, 2006	
Figure 2-26	2-40
Worldwide Hospital Information Systems Chart Tracking: Number Of Units Shipped, Market Forecasts 2007 - 2013	
Table 2-27	2-41
Worldwide Hospital Information Systems Chart Tracking: License & Service Fees, Market Forecasts 2007 - 2013	

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Table 2-28	2-42
Worldwide Hospital Information Systems Chart Tracking: License & Service Fees, Market Forecasts 2007 - 2013	
Figure 2-29	2-44
Worldwide Hospital Information Systems Clinical Data Repository: License & Service Fees, Dollars, Market Shares 2006	
Table 2-30	2-45
Worldwide Hospital Information Systems Clinical Data Repository: License & Service Fees, Market Shares, 2006	
Figure 2-31	2-46
Worldwide Hospital Information Systems Clinical Data Repository: Number Of Units Shipped, Market Forecasts 2007 - 2013	
Figure 2-32	2-47
Worldwide Hospital Information Systems Clinical Data Repository, Market Forecasts 2007 - 2013	
Table 2-33	2-48
Worldwide Hospital Information Systems Clinical Data Repository: License & Service Fees, Market Forecasts 2007 - 2013	
Figure 2-34	2-50
Worldwide Hospital Information Systems: Clinical Decision Report, Market Shares, 2006	
Table 2-35	2-51
Worldwide Hospital Information Systems: Clinical Decision report, Market Shares, 2006	
Figure 2-36	2-52
Worldwide Hospital Information Systems Clinical Decision Report: Number Of Units Shipped, Market Forecasts 2007 - 2013	
Figure 2-37	2-53
Worldwide Hospital Information Systems Clinical Decision Report: License and Service Fees, Market Forecasts 2007 - 2013	
Table 2-38	2-54
Worldwide Hospital Information Clinical Decision Report: License & Service Fees, Market Forecasts 2007 - 2013	

ELECTRONIC MEDICAL RECORD PRODUCT DESCRIPTION

Table 3-1	3-2
McKesson Horizon Patient Folder Electronic Record Functions	
Table 3-2	3-3
McKesson Horizon Patient Folder Electronic Record Benefits	
Table 3-3	3-5
McKesson Horizon Performance Manager Benefits	
Table 3-4	3-6
McKesson Horizon Patient Portal features	
Table 3-5	3-8
McKesson Horizon Patient Portal Benefits	
Table 3-6	3-10
McKesson Pathways Regulatory Guidelines Compliance Advisor Benefits	
Table 3-7	3-12
McKesson Pathways Contract Management Benefits	
Table 3-8	3-14
McKesson Pathways Contract Management Denial and Appeal Analysis Module Benefits	
Table 3-9	3-16
McKesson Electronic Health Record Benefits	
Table 3-10	3-19
McKesson Telehealth Monitoring Application Features	

Table 3-11	3-20
McKesson Telehealth Clinician Benefits	
Table 3-12	3-23
McKesson Horizon Web and Portal Healthcare Delivery Business Insight Benefits	
Table 3-13	3-24
McKesson Horizon Distance Learning Benefits	
Table 3-14	3-26
Meditech Enterprise Medical Record continuum of care Facility types	
Table 3-15	3-27
Meditech Enterprise Medical Record Accessibility Features	
Table 3-16	3-28
Meditech Enterprise Medical Record Accessibility Features	
Table 3-17	3-29
Meditech Historical Patient Data Sources	
Table 3-18	3-31
Meditech Electronic Medical Record Patient Care Functions	
Table 3-19	3-32
Meditech Electronic Medical Record Patient Information Categories	
Table 3-20	3-35
Meditech Patient-Oriented Profile Capabilities	
Table 3-21	3-36
Meditech Patient / Physician Alert Capabilities	
Table 3-22	3-37
Meditech Electronic Patient Record Tool Functions	
Table 3-23	3-38
Meditech Electronic Patient Record Graphical Tool Capabilities	
Table 3-24	3-40
Value Of Enterprise Medical Record Electronic Links To Meditech Enterprise Medical Record	
Table 3-25	3-41
Meditech Patient Care Management PCS Functions	
Table 3-26	3-42
Meditech Patient Care Management Clinical Content	
Table 3-27	3-45
Meditech Documentation of Patient Information	
Table 3-28	3-46
Meditech Medication Administration Record (MAR)	
Table 3-29	3-47
Meditech Reporting and Printing Capabilities	
Table 3-30	3-48
Meditech Reporting and Printing Benefits	
Table 3-31	3-50
Meditech Enterprise Patient Index EPI and Medical Records Features	
Table 3-32	3-51
Meditech Enterprise Patient Index EPI and Medical Records Functions	
Table 3-33	3-63
Meditech Patient Care Inquiry Functions	
Table 3-34	3-71
Unified Cerner Millennium® Architecture Benefits	
Table 3-35	3-73
Cerner Electronic Patient Records	
Table 3-36	3-77
Cerner Operational Outcomes Functions	

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Table 3-37	3-79
Cerner Knowledge Partner Tasks	
Table 3-38	3-81
Cerner Knowledge Infrastructure Solutions:	
Table 3-39	3-82
Benefits of Cerner CMT	
Table 3-40	3-86
Eclipsys Sunrise Health Information Record Manager Return On Investment Factors	
Table 3-41	3-99
EpicCare Ambulatory EMR Features	
Table 3-42	3-101
EpicCare Paper / Electronic Records Management Functions	
Table 3-43	3-103
EpicCare Cadence's Core Scheduling Components	
Table 3-44	3-112
Siemens Online Medical Record Benefits	
Table 3-45	3-114
Misys Comprehensive Clinical Decision Support CPOE	
Table 3-46	3-116
Misys Comprehensive Clinical Decision Support Modules	
Table 3-47	3-118
Misys EMR: Features and Benefits	
Table 3-48	3-123
QuadraMed Access Management Solutions Functions	
Table 3-49	3-128
QuadraMed WinPFS® Productivity and Benchmarking System Benefits	
Table 3-50	3-133
MDS MEDICAL / All scripts TouchChart Electronic Health Records Software Benefits	
Table 3-51	3-141
SOAPware Included Functionality	
Table 3-52	3-148
SOAPware Products	

HEALTHCARE ELECTRONIC MEDICAL RECORD (EMR) SYSTEMS TECHNOLOGY

Table 4-1	4-10
Healthcare Industry Infrastructure Technical Factors	
Table 4-2	4-13
Hospital Information Software Technology Functions	
Table 4-3	4-24
Types of Standards in the Healthcare Supply Chain	
Table 4-4	4-28
Service Oriented Architecture (SOA) Functions	

HOSPITAL INFORMATION SYSTEM ELECTRONIC MEDICAL RECORD COMPANY PROFILES

Table 5-1	5-3
HIMSS Segments	
Table 5-2	5-5
HIMSS Top Companies:	
Table 5-3	5-7
Key Elements Of Cerner Business Strategy	

Table 5-4	5-9
Key Elements Of Cerner Market Functions	
Table 5-5	5-12
Cerner Elements of Positioning for Continued Long-Term Growth	
Table 5-6	5-19
Cerner Electronic Positioning	
Table 5-7	5-57
Hyperion Business Performance Management Key Market Dynamics	
Table 5-8	5-59
Hyperion Strategy Key Elements	
Table 5-9	5-71
Lawson S3 Enterprise Performance Management Applications	
Table 5-10	5-72
Lawson S3 Supply Chain Management Applications	
Table 5-11	5-73
Lawson S3 Human Capital Management Applications Include	
Table 5-12	5-75
Lawson S3 Business Process Management Applications	
Table 5-13	5-82
Lawson M3 Product Benefits of Solutions	
Table 5-14	5-92
Misys Product Set	
Table 5-15	5-103
Meditech Authorization and Referral Management Highlights:	
Table 5-16	5-116
Siemens Medical Solutions offerings:	

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ABOUT THE PRINCIPAL AUTHORS

ELLEN T. CURTISS, TECHNICAL DIRECTOR, CO-FOUNDER OF WINTERGREEN RESEARCH, CONDUCTS STRATEGIC AND MARKET ASSESSMENTS IN TECHNOLOGY-BASED INDUSTRIES. PREVIOUSLY SHE WAS A MEMBER OF THE STAFF OF ARTHUR D. LITTLE, INC., FOR 23 YEARS, MOST RECENTLY AS VICE PRESIDENT OF ARTHUR D. LITTLE DECISION RESOURCES, SPECIALIZING IN STRATEGIC PLANNING AND MARKET DEVELOPMENT SERVICES. SHE IS A GRADUATE OF BOSTON UNIVERSITY AND THE PROGRAM FOR MANAGEMENT DEVELOPMENT AT HARVARD GRADUATE SCHOOL OF BUSINESS ADMINISTRATION. SHE IS THE AUTHOR OF RECENT STUDIES ON WORLDWIDE TELECOMMUNICATIONS MARKETS, THE TOP TEN INTERNET EQUIPMENT COMPANIES, THE TOP TEN CONTRACT MANUFACTURING COMPANIES, AND THE TOP TEN TELECOMMUNICATIONS MARKET ANALYSIS AND FORECASTS.

SUSAN EUSTIS, PRESIDENT, CO-FOUNDER OF WINTERGREEN RESEARCH, HAS DONE RESEARCH IN COMMUNICATIONS AND COMPUTER MARKETS AND APPLICATIONS. SHE HOLDS SEVERAL PATENTS IN MICROCOMPUTING AND PARALLEL PROCESSING. SHE HAS THE ORIGINAL PATENTS IN ELECTRONIC VOTING MACHINES. SHE HAS NEW PATENT APPLICATIONS IN FORMAT VARYING, MULTIPROCESSING, AND ELECTRONIC VOTING. SHE IS THE AUTHOR OF RECENT STUDIES OF THE REGIONAL BELL OPERATING COMPANIES' MARKETING STRATEGIES, INTERNET EQUIPMENT, BIOMETRICS, A STUDY OF INTERNET EQUIPMENT, WORLDWIDE TELECOMMUNICATIONS EQUIPMENT, TOP TEN TELECOMMUNICATIONS, DIGITAL LOOP CARRIER, WEB HOSTING, WEB SERVICES, AND APPLICATION INTEGRATION MARKETS. MS. EUSTIS IS A GRADUATE OF BARNARD COLLEGE.

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