

WINTERGREEN RESEARCH, INC.

**HIS Patient Accounting Systems Market Opportunities,  
Strategies, and Forecasts 2007 to 2013**

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**HIS Patient Accounting Systems**

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*Picture by Susie Eustis*

**MOUNTAINS OF OPPORTUNITY**

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

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**CHECK OUT THESE KEY TOPICS**

**REPORT # SH29821530    485 PAGES    122 TABLES AND FIGURES    2007    \$3,200**

*MARKET FOR HEALTHCARE PATIENT ACCOUNTING IT SOLUTIONS*  
*Market For Healthcare IT Patient Accounting*  
**Market For Healthcare Patient Accounting IT Market Forecasts**  
**Healthcare Hospital Industry**

Consumer- and Employer-Driven Healthcare  
Electronic patient record Security Costs  
*HEALTH LEVEL SEVEN (HL7) ORGANIZATION*  
*BENEFITS ADMINISTRATION*  
**ACCOUNTS PAYABLE MARKETS**  
*COST ACCOUNTING*  
*HEALTHCARE AND HEALTHCARE IT INDUSTRY*  
**HOSPITAL AND PHYSICIAN PRACTICE MARKET CONDITIONS**  
**HEALTHCARE INFORMATION TECHNOLOGY MARKET**  
**SOA ENGINES**  
*HOSPITAL INFORMATION SOFTWARE TECHNOLOGY*  
*LEAPFROG GROUP*

**OPPORTUNITY ABOUNDS**

**WinterGreen Research, Inc.**  
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## **HIS Patient Accounting Systems Market Description, Market Analysis, Product Description, and Company Profiles**

The market for hospital IT financial and billing solutions is intensely competitive, rapidly evolving, and subject to rapid technological change. The breadth and quality of solution and service offerings, the stability of the solution provider, the features and capabilities of the information systems and devices, the ongoing support for the systems and devices and the potential for enhancements and future compatible software solutions and devices.

A shared database consolidates non-repetitive data, eliminating time-consuming duplication of data entry and fragmentation of records. Shared process servers provide patient identification, scheduling, ordering, charging, results, documentation and measurement, eliminating the confusion of multiple applications performing the same functions in multiple, unconnected ways.

Competitors in the HIT healthcare solutions and services market include: Cerner, Eclipsys Corporation, Epic Systems Corporation, GE Healthcare Technologies, iSoft Corporation, McKesson Corporation, Medical Information Technology, Misys Healthcare Systems, and Siemens Medical Solutions Health Services Corporation, each of which offers a suite of software solutions. Other competitors focus on only a portion of the market that the major participants address.

Automation of manual process is what achieves accuracy in the delivery of patient accounting. Short collection times depend on accuracy of record keeping and automation of process. Physician confidence in the IT system depends on timely payment.

The significant difference in reliability between three nines of availability offered by the distributed servers and the five nines of availability on Z OS on the mainframe hardware has measurable impact on the cost of manual process vs. the cost of automated process. It has further impact on the perception of a hospital group as a leading health care institution by the physicians who practice there.

Hospital information systems credit collections software is shifting as systems become more integrated. Integrated systems interconnect with automated coding that creates more automated process. Credit collections software is modernized with sophisticated techniques for implementing personal data collection. The related digital evidence and investigation issues are being included as part of automated process.

**The use of mainframes for real time hospital billing systems implementations provides security and protections that is needed in modern billing and collections systems. They have a significant impact on people's trust in online transactions. Despite the number of reported incidents, cases of online ID theft are currently examined in an ad hoc empirical fashion.**

**The mainframe security supports a structured approach to protect Internet based, patient and physician facing systems. The issue of online theft and the need for co-ordinated actions for compliance with HIPAA requirements are driving implementation of mainframe systems for hospitals.**

**Patient billing market forecasts are at 1.1 million units in 2006, anticipated to reach 1.54 million units by 2013.**

## Companies Profiled

### Market Leaders

McKesson  
Siemens

### Market Participants

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

# HIS Patient Accounting Systems Strategies and Forecasts 2007-2013

## REPORT METHODOLOGY

THIS IS THE 312TH 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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# HIS Patient Accounting Systems Strategies and Forecasts 2007 to 2013

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