

**Homecare Back End, Front End, Integration
And Medical Consolidated Information
Systems Market Strategies And Forecasts
2002-2010**



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*Homecare Consolidated Information Systems:
Bringing A Stream Of Information To Providers And Clinical Staffs*

Homecare consolidated front end, back end, integration, and medical information system software is targeted to non-acute health care distributors. This market has been highly fragmented. Consolidation in the market is causing significant change in the industry.

Products are differentiated in the market based upon the granularity of the offerings and the ability to meet the specific needs of the homecare providers.

The homecare market is changing. New services needed in the home include intravenous (IV) therapy, pain control, and basic needs services delivery. Delivery of new services depends on systems integration.

Delivery of these services depends as well on automation of the reimbursement process. The ability of the existing homecare dealer network to deliver advanced services in the home is limited in part by an inability to bill for those services. New systems fulfill that need.

U.S. homecare information systems and integration markets at \$1.2 billion in 2001 are expected to reach \$2.6 billion by 2010. U.S. homecare information systems markets are expected to grow at 17% per year in 2003, with the growth rate accelerating to 25% per year on average through 2010. Market forces for growth relate to the efficiency and efficacy of homecare services delivery.

Companies Profiled

3M
Accenture
Accumedic Computer Systems
Ariba
Advanced Information Management
American Health Care (AHC) Software Enterprises
BeyondNow Technologies
BroadVision
Cap Gemini Ernst & Young
CareCentric
Cerner
Commerce One
Deloitte Consulting

Fujitsu
Golden Rule Software
Green Mountain Software Corporation
Hann's On Software
HealthCare Synergy
Healthlink
IBM Global Services
IMA Technologies
KPMG Consulting
Lewis Computer Services
McKesson
Medical Information Technology (Meditech)
Misys Group / Medic Computer Systems
Open Market
Pharmacy Data Systems
PricewaterhouseCoopers
Pro Business Systems
Procura
Profium
SAS
STATLinc Computer Services
VasTech
Government Agencies With Homecare Responsibility
National Associations And Regional Home Health Intermediaries
(RHHIs)
State Home Health Associations

REPORT METHODOLOGY

THIS IS THE ONE-HUNDRED AND TWENTY-FIFTH REPORT IN A SERIES OF MARKET RESEARCH REPORTS THAT PROVIDE FORECASTS IN COMMUNICATIONS, TELECOMMUNICATIONS, THE INTERNET, COMPUTER, SOFTWARE, AND TELEPHONE EQUIPMENT. 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. MARKET SHARE ANALYSIS INCLUDES CONVERSATIONS WITH KEY CUSTOMERS OF PRODUCTS, INDUSTRY SEGMENT LEADERS, MARKETING DIRECTORS, DISTRIBUTORS, LEADING MARKET PARTICIPANTS, 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 OPINION LEADERS IN THE MARKET SEGMENT.

Table of Contents**HOME CARE CONSOLIDATED INFORMATION SYSTEMS EXECUTIVE SUMMARY**

Homecare Information Systems	ES-1
Home Medical Information Systems Market Driving Forces	ES-2
Homecare Information System Software Market Shifts	ES-4
Competition Forms Basis Of U.S. Medical Care Services Delivery	ES-6
Summary Market Forecasts	ES-7
Fair Delivery of 24 Hour Per Day Homecare Services	ES-10
Prospective Payment System (PPS)	ES-12
Customizable Technology Focused On Home Care	ES-12

1. HOME CARE CONSOLIDATED INFORMATION SYSTEMS MARKET DESCRIPTION

1.1	Functions Offered	1-1
1.2	Streamlining Internal Systems	1-1
1.3	Return On B2B Investments	1-2
1.4	Specialty Specific Solutions	1-3
1.5	Homecare Information System Software Market Shifts	1-4
1.5.1	Characteristics Particular To The Homecare Information System Market	1-7
1.5.2	Prospective Payment System (PPS)	1-7
1.5.3	Home Care Services Billing Issues	1-8
1.5.4	Managed Care Requirements	1-9
1.6	Need For Automation Of Home Care Companies	1-12
1.7	Homecare Information Technology Consolidated Homecare Information System	1-14
1.7.1	History Of Low Investment In Healthcare Information Technology	1-16
1.7.2	Market Driving Forces For Worldwide Homecare Information Systems	1-17
1.7.3	Treatment Trends	1-17
1.7.3	U.S. Healthcare Delivery Consolidated Homecare Information System	1-19
1.7.4	Competition Forms Basis Of U.S. Medical Care Services Delivery	1-19
1.7.5	Science And Medical Technology	1-20
1.8	Market Drivers For Healthcare Cost Containment	1-21
1.8.1	Managed Care Organization Impact	1-22
1.8.2	Reasons Home Health Care Has Gained Wide-Spread Acceptance	1-22
1.8.3	Managed Care Change In The Healthcare Consolidated Homecare Information System	1-23
1.8.4	Homecare For People With Long Term Disabilities	1-23
1.9	Worldwide Homecare Information Systems Market Distribution	1-24
1.9.1	Delivery Of Non-Acute Health Care	1-24
1.9.2	Leveraging Distribution Channels	1-25
1.9.3	Worldwide Homecare Information Systems Market Positioning	1-25
1.10	Increased Need For Information Technology	1-27
1.10.1	Medical Error	1-28
1.11	Shortcomings Of Traditional Healthcare Information Systems	1-28
1.12	Homecare Information Systems Market Strategy	1-30
1.12.1	Integrated Healthcare Information Technology Solutions	1-31
1.12.2	Flexible Product-Delivery Options	1-31
1.12.3	Leveraging Existing Customer Base	1-32
1.13	Homecare Information Systems Market Trends	1-32
1.13.1	Clinician Support For Spending Less Time At The Desktop And More Time Taking Care Of Patients	1-34

2. HOME CARE CONSOLIDATED INFORMATION SYSTEMS MARKET SHARES AND FORECASTS

2.1	Home Medical Consolidated Information Systems Market Driving Forces	2-1
2.2	Home Medical Information Systems Market Segments	2-3
2.3	Summary Market Forecasts	2-6
2.4	Technological Trends Impact on Demand for Homecare Services	2-13

2.4.1	Benefits of Integration Solutions	2-13
2.5	Number Of Home Healthcare And Hospice Agencies	2-15
2.5.1	Small Homecare Agencies	2-18
2.5.2	Mid Size Homecare Agencies	2-19
2.5.3	Large Homecare Agencies	2-20
2.6	Geographical Segments	2-21
2.7	Healthcare Industry Shifts	2-22
2.8	Home Health Agency Analysis By State	2-25
2.9	Home Hospice Analysis By State	2-27
2.10	Home Medical Information Systems Market Shares	2-30
2.10.1	Home Medical Information Systems Market Participants	2-35
2.10.2	Home Care Information Systems (HCIS) / Medic Computer Systems	2-36
2.11	Integration Company Market Definitions And Markets Addressed	2-36
2.11.1	Application Integration Market Shares 2001	2-39
2.11.2	Application Integration Market Forecasts	2-44
2.11.3	Application Server Web Services Forecasts	2-44
2.11.4	Application Integration Web Services Forecasts	2-47
2.11.5	Homecare provider Portal Web Services Forecasts	2-47
2.11.6	Market Growth Factors	2-48
2.11.7	Application Segments	2-50
2.11.8	Homecare provider Portal Market Forecasts	2-51
2.11.9	Portals at the Center of Homecare Information Systems Business Strategy	2-52
2.11.10	Application Server Market Shares	2-54
2.11.11	Homecare provider Portal Market Participants	2-55
2.11.12	BPM Market Participants	2-55
2.11.13	IBM	2-56
2.11.14	BEA Systems	2-57
2.11.15	Tibco	2-58
2.11.16	Vitria	2-59
2.11.17	GE Global Exchange Services Homecare Information Systems Business Software	2-60

3. HOMECARE INFORMATION SYSTEMS PRODUCTS

3.1	McKesson HBOC	3-1
3.1.1	Pathways Homecare	3-2
3.1.2	Pathways Homecare System Characteristics	3-4
3.1.3	Integrated System	3-7
3.1.4	Managed Care-Enabled	3-7
3.1.5	Prospective Payment System Ready	3-8
3.1.6	Pathways Homecare User-defined Organizational Structure	3-8
3.1.7	Pathways Homecare Flexible Security	3-8
3.1.8	Pathways Homecare Agency Management and Intake	3-9
3.1.9	Pathways Homecare Authorizations	3-11
3.1.10	Pathways Homecare Personnel Scheduling	3-11
3.1.11	Pathways Homecare Utilities	3-13
3.1.12	Pathways Homecare Point of Care Module	3-13
3.1.13	Pathways Hospice Support	3-16
3.1.14	Pathways Homecare Telephony	3-16
3.1.15	Pathways Homecare Reimbursement Management	3-18
3.1.16	Pathways Homecare Flexible Reimbursement	3-20
3.1.17	Pathways Homecare InfoCenter	3-23
3.1.18	Pathways Homecare Account Profile	3-23
3.1.19	Support For Agency Relationship With Referring Physicians	3-23
3.2	Cerner ProCall Home Care Management System	3-26
3.3	BeyondNow Technologies	3-28
3.3.1	BeyondNow Customizable Software Designed For Home Care	3-28
3.3.2	BeyondNow Technologies / Hospice	3-33

3.3.3	BeyondNow Referral Management	3-33
3.3.4	BeyondNow Patient Profile Searching	3-34
3.3.5	BeyondNow HIPAA Compliance for HomeWorks	3-37
3.3.6	BeyondNow Technologies Support For Prospective Payment System (PPS) Reimbursement System	3-38
3.3.7	BeyondNow Technologies / Sentara Healthcare	3-38
3.4	Patient Care Technologies / Meditech: inSync	3-39
3.4.1	PtCT Point-Of-Care Driven Process	3-41
3.4.2	inSync Point of Care Driven Process	3-42
3.4.3	inSync Structured Charting	3-43
3.5	Medic Computer Systems / Home Care Information Systems (HCIS)	3-44
3.5.1	Home Care Information Systems (HCIS) Vision HomeCare	3-44
3.5.2	Vision HomeCare Clinical Capabilities	3-50
3.5.3	Vision HomeCare Scheduling Capabilities	3-51
3.5.4	Vision HomeCare Hospice Capabilities	3-52
3.5.5	Vision HomeCare OASIS Benchmarking Capabilities	3-53
3.5.6	Vision HomeCare ORYX Benchmarking Capabilities	3-53
3.5.7	Vision HomeCare Drug Information	3-53
3.5.8	Vision HomeCare Billing Capabilities:	3-54
3.5.9	Vision HomeCare Clinical Capabilities	3-54
3.6	Siemens Home Health Services Solutions	3-61
3.7	Siemens / Novius Home Care Financial View	3-62
3.8	Siemens / Novius Home Care Clinical View	3-64
3.9	Siemens / Novius Home Health Solutions Interfaces	3-66
3.9.1	Siemens / Novius Family Of Information Solutions	3-68
3.9.2	Siemens / Novius PPS SnapShot	3-69
3.10	Meditech E-Commerce Solution	3-70
3.10.1	Meditech HIPAA Positioning	3-72
3.11	CareCentric	3-73
3.12	Healthcare Synergy	3-73
3.13	IMA Technologies	3-74
3.13.1	CaseTrakker Target Markets	3-75
3.13.2	CaseTrakker Flexible Object-Oriented Design	3-77
3.13.3	CaseTrakker System Integration	3-77
3.13.4	CaseTrakkerLAN	3-78
3.13.5	CaseTrakker Voyager	3-78
3.13.6	CaseTrakker Enterprise	3-78
3.14	Lewis Computer POC Product	3-79
3.15	Fujitsu WebCare	3-79
3.16	Agilent Telemetry System	3-80

4. HOMECARE INFORMATION SYSTEMS TECHNOLOGY

4.1	Homecare Information Systems Requirements	4-1
4.1.1	Internet Protocol (IP) Mission Critical Functionality	4-4
4.2	Homecare Information Systems Toolkits	4-6
4.2.1	Process Management Toolkits	4-7
4.3	Homecare Information Systems -Services	4-9
4.4	Internet	4-16
4.4.1	Upgrading Software	4-17
4.4.2	End-To-End Flow From The Security Viewpoint	4-17
4.4.3	Homecare Information Systems Services Security Policy Configuration	4-18
4.4.4	Role Of Mission Critical Middleware Messaging	4-21
4.4.5	IBM Mission-Critical Functionality	4-22
4.4.6	IBM Websphere MQ Messaging Software	4-23
4.4.7	Linking Internal Operations	4-24
4.5	Web Services	4-26
4.5.1	Services Guarantee Compliance	4-27

4.5.2	Outcomes Monitoring	4-27
4.5.3	Web Services Key Standards	4-28
4.5.4	Web Services Definition	4-29
4.6	Web Services Architecture	4-31
4.7	Distributed Service Discovery Methods	4-32
4.7.1	Web Services Positioning	4-33
4.8	OASIS	4-34
4.9	SOAP	4-35
4.9.1	SOAP Framework	4-35
4.9.2	Framework For Developing Web Services	4-36
4.9.3	Apache SOAP	4-36
4.9.4	Load Balancer With SSL Support	4-37
4.9.5	Points Of Failure	4-37
4.9.6	SOAP Limitations	4-38
4.9.7	SOAP Protocol Uses Multi-Step Process	4-39
4.9.8	Framework Benefits	4-39
4.9.9	SOAP Test Strategies	4-39
4.9.10	SOAP Solutions	4-41
4.10	WSDL	4-42
4.10.1	WSDL Service Descriptions	4-42
4.11	UDDI Registry	4-43
4.11.1	UDDI Test Registries	4-44
4.11.2	UDDI Distributed Web Service Discovery	4-44
4.11.3	UDDI Consortium	4-46
4.11.4	WS-Inspection Document Extensibility	4-46
4.12	Language XSLT	4-47

5. HOMECARE CONSOLIDATED INFORMATION SYSTEMS COMPANY DESCRIPTIONS

5.1	3M	5-1
5.2	Accenture	5-3
5.2.1	Marketing Strategy	5-3
5.2.2	Redefining Supply Chains	5-4
5.2.3	Business Process Integration	5-5
5.2.4	Flexible Business Models	5-5
5.2.5	Management And Technology Consulting Services	5-7
5.2.6	Service Lines	5-7
5.2.7	Strategy And Business Architecture	5-8
5.3	Accumedic Computer Systems	5-8
5.4	Ariba	5-9
5.5	Advanced Information Management	5-10
5.6	Advanced Information Management	5-10
5.7	American Health Care (AHC) Software Enterprises	5-10
5.8	BeyondNow Technologies	5-12
5.8.1	BeyondNow Technologies / Baptist Health Care	5-12
5.8.2	BeyondNow Technologies / Sentara Healthcare	5-13
5.8.3	BeyondNow Integrated System	5-13
5.8.4	BeyondNow Technologies Facilitates Speed To Billing	5-14
5.9	BroadVision	5-14
5.10	Cap Gemini Ernst & Young	5-16
5.10.1	Integration Framework	5-17
5.10.2	Interface Structures	5-18
5.10.3	Integration Framework	5-19
5.11	CareCentric	5-20
5.12	Cerner	5-20
5.12.1	Cerner Revenues	5-21
5.12.2	Cerner Health Care Solutions	5-22
5.12.3	Cerner Clinical And Financial Systems Integration	5-23

5.12.4	Cerner Patient Safety Solutions	5-24
5.12.5	Cerner Radiology Imaging	5-25
5.12.6	Cerner Supply Chain Automation	5-25
5.12.7	Cerner Customers	5-26
5.12.8	Cerner Strategic Focus	5-26
5.13	Commerce One	5-26
5.14	Deloitte Consulting	5-28
5.14.1	Health Care Enterprise Application Integration (EAI) Solution Set	5-29
5.14.2	Advanced Mobile Services	5-30
5.15	Fujitsu	5-30
5.15.1	Fujitsu PC Corporation	5-31
5.15.2	Fujitsu Software Corporation	5-31
5.16	Golden Rule Software	5-32
5.17	Green Mountain Software Corporation	5-32
5.18	Hann's On Software	5-33
5.19	HealthCare Synergy	5-33
5.19.1	Healthcare Synergy Products	5-34
5.20	Healthlink	5-34
5.21	IBM Global Services	5-35
5.21.1	Billion Information Technology Services	5-36
5.21.2	Traditional Lines Of Business	5-37
5.21.3	Balance Of Power Shifts From Producers To Consumers	5-38
5.22	IMA Technologies	5-39
5.23	KPMG Consulting	5-40
5.23.1	Vitria / KPMG Consulting Strategic Alliance	5-41
5.23.2	KPMG Consulting Positioning	5-42
5.23.3	Supply Chain Management	5-44
5.24	Lewis Computer Services	5-45
5.25	McKesson	5-46
5.25.1	Pathways Homecare	5-47
5.26	Medical Information Technology (Meditech)	5-47
5.26.1	Meditech Internet Interfaces	5-48
5.26.2	Meditech and IBM	5-50
5.26.3	Meditech Third Quarter 2001 Revenue	5-50
5.27	Misys Group / Medic Computer Systems	5-50
5.27.1	Medic Products	5-51
5.27.2	Home Care Information Systems (HCIS) / Medic Computer Systems	5-51
5.27.3	Home Care Information Systems (HCIS) Software	5-52
5.27.4	Home Care Information Systems Acquires Data Counsel	5-52
5.28	Open Market	5-53
5.29	Pharmacy Data Systems	5-53
5.30	PricewaterhouseCoopers	5-54
5.30.1	Management Consulting Services	5-55
5.30.2	Determinet	5-56
5.31	Pro Business Systems	5-56
5.31.1	Pro Business Systems Products	5-57
5.32	Procura	5-58
5.32.1	Hedgehog Systems	5-58
5.32.2	Procura / Micro Medical Systems	5-59
5.33	Profium	5-59
5.34	SAS	5-59
5.35	STATLinc Computer Services	5-60
5.36	VasTech	5-60
5.37	Government Agencies With Homecare Responsibility	5-61
5.38	National Associations And Regional Home Health Intermediaries (RHHIs)	5-61
5.39	State Home Health Associations	5-62

List of Tables and Figures

Table ES -1 Home Medical Market Driving Forces	ES-2
Table ES -2 Home Medical Information Systems Market Driving Forces	ES-3
Table ES -3 Market Positioning Of Homecare Information System Software	ES-5
Figure ES-4 Worldwide Homecare Consolidated Information System Market Forecasts, 2002-2010	ES-8
Table 1-1 Streamlining Internal Systems	1-2
Table 1-2 Aims of Consolidated Systems	1-3
Table 1-3 Homecare Information System Software Characteristics	1-5
Table 1-4 Market Characteristics For Evaluation of Homecare Information System Software Vendors	1-6
Table 1-5 Home Care Services Billing Issues	1-8
Table 1-6 JCAHO ORYX Requirements	1-10
Table 1-7 Home Care Standard Services Provided	1-13
Table 1-8 Home Care Specialty Services Provided	1-14
Table 1-9 Home Market Information System Software Market Segment	1-15
Table 1-10 Factors Relating To Value Of Home Health Care Over Institutional Care	1-18
Table 1-11 Worldwide Homecare Information Systems Market Positioning	1-26
Table 1-12 Strategies For Offering Technology Solutions To The Home Healthcare Consolidated Homecare Information System	1-30
Table 1-13 Homecare Information Systems Market Trends	1-33
Table 2-1 Home Medical Market Driving Forces	2-1
Table 2-2 Home Medical Information Systems Market Driving Forces	2-2
Figure 2-3 Homecare Software Shipments and Services By Segment, 2001	2-4
Table 2-4 Homecare Software Shipments and Services By Segment, 2001	2-5
Figure 2-5 Worldwide Homecare and Hospice Spending Market Forecasts, Dollars, 2002-2010	2-7
Figure 2-6 Worldwide Homecare and Hospice Consolidated Information System Spending Market Forecasts, Dollars, 2002-2010	2-8
Figure 2-7 Worldwide Consolidated Information System Spending As a Percent of Total Homecare and Hospice Spending Market Forecasts, Dollars, 2002-2010	2-9

Figure 2-8	2-10
U.S. Homecare and Hospice Spending Market Forecasts, Dollars, 2002-2010	
Figure 2-9	2-11
U.S. Homecare and Hospice Consolidated Information System Spending Market Forecasts, Dollars, 2002-2010	
Figure 2-10	2-12
U.S. Consolidated Information System Spending As a Percent of Total Homecare and Hospice Spending Market Forecasts, Dollars, 2002-2010	
Table 2-11	2-14
Benefits of Integration Solutions	
Figure 2-12	2-15
U.S. Homecare / Hospice Agency Market Forecasts, 2002-2007	
Table 2-13	2-17
U.S. Homecare / Hospice Agency Market Forecasts, 2002-2007	
Table 2-14	2-18
U.S. Homecare / Hospice Small Agency Market Forecasts, 2002-2007	
Table 2-15	2-19
U.S. Homecare / Hospice Mid Size Agency Market Forecasts, 2002-2007	
Table 2-16	2-20
U.S. Homecare / Hospice Large Agency Market Forecasts, 2002-2007	
Figure 2-17	2-21
Homecare Consolidated Information System Shipments By Region, 2001	
Table 2-18	2-22
Homecare Consolidated Information System Shipments By Region, 2001	
Table 2-19	2-23
Clinical And Management Information Systems Functions Integration Company Market Definitions and Markets Addressed	
Table 2-20	2-25
Home Health Agencies, By State	
Table 2-21	2-28
Number of Medicare Certified Hospice Agencies, By State, 2000	
Figure 2-22	2-32
U.S. Homecare Information System Software Market Shares, Dollars, 2001	
Table 2-23	2-33
U.S. Homecare Information System Software Market Shares, Dollars, 2001	
Figure 2-24	2-32
Worldwide Homecare Information System Software Market Shares, Dollars, 2001	
Table 2-25	2-33
Worldwide Homecare Information System Software Market Shares, Dollars, 2001	
Figure 2-26	2-40
Application Integration Market Shares, 2001	
Table 2-27	2-41
Application Integration Market Shares, 2001	
Figure 2-28	2-46
Web Services Portion of Application Server Market, Forecasts 2001-2007	
Table 2-29	2-48
Applications Server Market Positioning	
Table 2-30	2-49
Market Driving Forces For Applications Servers	
Table 2-31	2-50
E-Commerce Target Markets	
Table 2-32	2-53
Portal Homecare Information Systems Business Strategy	
Table 2-33	2-54
Applications Server Market Shares, 2001	

Table 3-1	3-3
Pathways Homecare Systems Positioning	
Table 3-2	3-5
Pathways Homecare Target Markets	
Table 3-3	3-6
Pathways Homecare System Uses	
Table 3-4	3-7
Types Of Homecare Services	
Table 3-5	3-10
Pathways Homecare Agency Management Functionality	
Table 3-6	3-12
Pathways Homecare Personnel Scheduling Module	
Table 3-7	3-15
Pathways Homecare Clinical Documentation System Features	
Table 3-8	3-17
Pathways Homecare Telephone-Based Extension Features	
Table 3-9	3-19
Pathways Homecare Reimbursement Management Features	
Table 3-10	3-20
Pathways Homecare Reimbursement Models	
Table 3-11	3-21
Pathways Homecare Options For Revenue Recognition	
Table 3-12	3-25
Pathways Homecare Internet Solutions Benefits	
Table 3-13	3-26
The Cerner ProCall Home Care Management System Functions	
Table 3-14	3-27
Integration Suite Automation Of Healthcare Domains	
Table 3-15	3-29
BeyondNow Referral Management Functions	
Table 3-16	3-30
BeyondNow Reimbursement Management Functions	
Table 3-17	3-31
BeyondNow Patient to Human Resource Matches	
Table 3-18	3-32
BeyondNow Billing and Accounting Functions	
Table 3-19	3-34
BeyondNow Comprehensive Point-of-Care On-Line Documentation	
Table 3-20	3-35
BeyondNow Patient Profile Searching	
Table 3-21	3-36
BeyondNow Support For Access To Community Resources	
Table 3-22	3-37
BeyondNow Care Plans	
Table 3-23	3-39
PtCT System Features To Accommodate Home Care Needs	
Table 3-24	3-46
Vision HomeCare Information System Functions	
Table 3-25	3-47
Vision HomeCare Information System Features	
Table 3-26	3-48
Vision HomeCare User Features	
Table 3-27	3-49
Vision HomeCare Billing Features	
Table 3-28	3-52
Vision HomeCare Target Markets	

Table 3-29	3-56
Vision HomeCare Scheduling Capabilities	
Table 3-30	3-57
Vision HomeCare Prospective Payment System (PPS) Capabilities	
Table 3-31	3-58
Vision HomeCare System Capabilities	
Table 3-32	3-59
Vision HomeCare Point of Care Field Capabilities	
Table 3-33	3-60
Vision HomeCare System Functional Scope	
Table 3-34	3-61
Siemens Healthcare Information Systems Solutions Modules	
Table 3-35	3-63
Siemens / Novius System Modules	
Table 3-36	3-65
Siemens / Novius Home Care Clinical View Functions	
Table 3-37	3-66
Home Health Solutions HL7 Interface Benefits	
Table 3-38	3-67
Home Health Solutions HL7 Technical Benefits	
Table 3-39	3-69
Home Health Solutions For Prospective Payment System (PPS)	
Table 3-40	3-71
Medical Information Technology e-commerce Initiative	
Table 3-41	3-72
Medical Information Technology E-Commerce System Features	
Table 3-42	3-75
CaseTrakker Version Selection	
Table 3-43	3-76
CaseTrakker Target Marketing	
Table 4-1	4-3
Homecare Information Systems Requirements	
Table 4-2	4-4
Homecare Information Systems Functions	
Table 4-3	4-6
Assessment Of Homecare Information Systems Services Tool Positioning	
Table 4-4	4-8
Functions Of An IP Addressing Device	
Table 4-5	4-9
Benefits Of an IP Addressing Device	
Table 4-5	4-11
Homecare Information Systems Modular Strategy	
Table 4-6	4-12
Homecare Information Systems Component Strategy	
Table 4-7	4-13
Homecare Information Systems Services Challenge	
Table 4-8	4-14
Internet Market Driving Forces	
Table 4-9	4-15
Internet Homecare Information Systems Resource Management	
Table 4-12	4-23
Enterprise Messaging Integration Functions	
Table 4-13	4-25
Software Application Integration Functions	

Table 5-1 Cerner Positioning	5-8
Table 5-2 Cerner Health Care Solutions	5-10
Table 5-3 IMA Technologies CaseTrakker Functions	5-18
Table 5-4 Meditech Internet Interfaces	5-22

ABOUT THE COMPANY

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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 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 IS THE AUTHOR OF RECENT STUDIES OF THE REGIONAL BELL OPERATING COMPANIES' MARKETING STRATEGIES, INTERNET EQUIPMENT, A STUDY OF INTERNET EQUIPMENT, WORLDWIDE TELECOMMUNICATIONS EQUIPMENT, TOP TEN TELECOMMUNICATIONS, DIGITAL LOOP CARRIER, WEB HOSTING, AND APPLICATION INTEGRATION MARKETS. MS. EUSTIS IS A GRADUATE OF BARNARD COLLEGE.

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