

WINTERGREEN RESEARCH, INC.

**Physician Office Electronic Medical Record Market  
Strategies, Shares, and Forecasts 2007 to 2013**

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**Physician Office Electronic Medical Records**

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*Picture by Susie Eustis*

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**ELECTRONIC PATIENT RECORD  
Physician Office Medical Record (EMR) Forecasts  
Physician Office Information Technology (HIT) Marketplace  
Electronic Medical Records (EMR)**

**Electronic Medical Records Systems Benefits  
EMR Information Systems Strategy  
INFORMATION SYSTEM SOFTWARE  
INFORMATION SYSTEM STORAGE  
EMR MARKET SHIFTS  
CLINICAL DATA REPOSITORY  
HEALTHCARE AND IT MEDICAL RECORDS INDUSTRY  
PHYSICIAN PRACTICE MARKET CONDITIONS  
HEALTHCARE INFORMATION TECHNOLOGY MARKET  
EMR INFORMATION SOA SOFTWARE  
EMR OPEN SYSTEMS  
EMR JAVA  
EMR J2EE (JAVA™ PLATFORM)**

*OPPORTUNITY ABOUNDS*

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Lexington, Massachusetts  
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## **Physician Office Electronic Medical Record Market Strategy, Market Shares, and Market Forecasts**

Physician office 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.

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 physician office is \$195K. The number sold is anticipated to grow. 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 physician office 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.

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 \$292 million in 2007 are anticipated to reach \$475 million by 2013.

Worldwide physician office 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  
GE  
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	

## Physician Office Electronic Medical Record Systems Strategies and Forecasts 2007-2013

### REPORT METHODOLOGY

THIS IS THE 318<sup>TH</sup> 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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## Physician Office Electronic Medical Record Strategies and Forecasts, 2007 to 2013

### Table of Contents

#### WORLDWIDE PHYSICIAN OFFICE ELECTRONIC MEDICAL RECORD MARKET EXECUTIVE SUMMARY

<b>WORLDWIDE PHYSICIAN OFFICE ELECTRONIC MEDICAL RECORD MARKET EXECUTIVE SUMMARY</b>	<b>ES-1</b>
Market For Physician Office Electronic Patient Record	ES-1
Physician Office Electronic Medical Records	ES-3
Market For Physician Office Electronic Patient Records	
Market Shares	ES-3
Office Electronic Patient Record	
Market Forecasts	ES-5
Packaged Electronic Medical Record (EMR) Systems	ES-5
Electronic Medical Record Dashboards	ES-7
Electronic Medical Record Dashboards Make Clinicians	
More Productive	ES-7
Physician Office Electronic Patient Record Solutions Market	ES-8
Use Of The Mainframe Accelerated	ES-11

#### PHYSICIAN OFFICE MEDICAL RECORDS INFORMATION SYSTEMS MARKET DESCRIPTION AND MARKET DYNAMICS

<b>1. ELECTRONIC MEDICAL RECORDS INFORMATION SYSTEMS MARKET DESCRIPTION AND MARKET DYNAMICS</b>	<b>1-1</b>
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

**PHYSICIAN OFFICE ELECTRONIC MEDICAL RECORD EMR INFORMATION SYSTEMS  
MARKET SHARES AND MARKET FORECASTS**

**PHYSICIAN OFFICE ELECTRONIC MEDICAL RECORD (EMR) MARKET  
SHARES AND MARKET FORECASTS**

		<b>2-1</b>
2.1	Market For Physician Office Electronic Medical Record	2-1
2.2	Market For Electronic Medical Records	2-4
2.2.1	Market For Physician Office Electronic Patient Records	
	Market Shares	2-4
2.3	Worldwide Physician Office Electronic Patient Record Systems	Market
	Forecasts	2-10
2.3.1	Enterprise Electronic Medical Record (EMR) Market	
	Dollar Forecasts	2-15
2.3.2	Enterprise Electronic Medical Record (EMR) Market Unit	
	Forecasts 2-19	
2.3.3	Electronic Medical Record Dashboards	2-34
2.3.4	Electronic Medical Record Dashboards Make Clinicians	
	More Productive	2-34
2.3.5	Cerner	2-35
2.3.6	McKesson	2-35
2.3.7	Siemens	2-36
2.3.8	McKesson Horizon Practice Analysis	2-36
2.3.9	Siemens Signature® HIS Support For Practice Management	2-38
2.3.10	IDX 2-40	
2.3.11	Eclipsys	2-40
2.3.12	Meditech Corporate Partner For Physician and Practice	
	Management Software LSS Improvements Focus on Quality,	
	Integration 2-42	
2.3.13	Misys Optimum™ Solutions	2-42
2.4	Physicians And Surgeon Practice Profiles	2-43
2.4.1	Family And General Practitioners	2-47
2.4.2	Anesthesiologists	2-48
2.4.3	General Internists	2-48
2.4.4	General Pediatricians	2-48
2.4.5	Obstetricians And Gynecologists	2-49
2.4.6	Psychiatrists	2-50
2.4.7	Surgeons	2-50
2.4.8	Physician Working Conditions	2-51
2.4.9	Number of Physicians Forecasts	2-52
2.4.10	Number of Physician Offices Forecasts	2-58
2.5	Worldwide Physician Office: Number Of Units Shipped,	
	Market Forecasts	2-63
2.6	Physician Office Electronic Patient Record Regional	
	Segment Analysis	2-69

**PHYSICIAN OFFICE ELECTRONIC MEDICAL RECORD PRODUCT DESCRIPTION**

<b>3. ELECTRONIC MEDICAL RECORD PRODUCT DESCRIPTION</b>	<b>3-1</b>	
3.1	McKesson Horizon Physician Office Patient Electronic Record	3-1
3.1.1	McKesson Horizon Performance Manager	3-6
3.1.2	McKesson Horizon Patient Portal	3-8
3.1.3	McKesson Pathways Regulatory Guidelines Compliance Advisor	3-11
3.1.4	McKesson Pathways Physician Office Contract Management	3-13
3.1.5	McKesson Electronic Health Record Small Group	

Practice Point Chart	3-15
3.2 GE Centricity® Physician Office	3-18
3.2.1 GE Centricity® Physician Office - Electronic Medical Records (EMR)	3-22
3.3 Meditech Physician Office Medical Record	3-24
3.3.1 Meditech Current Care/Clinical Information	3-27
3.3.2 Meditech Historical Patient Data	3-28
3.3.3 Meditech Confidential Records of Care	3-29
3.3.4 Meditech Electronic Medical Record Patient Care	3-29
3.3.5 Meditech Patient-Oriented Profiles	3-33
3.3.6 Meditech Enterprise Medical Record Patient Care System	3-38
3.3.7 Meditech Documentation of Patient Information	3-40
3.3.8 Meditech Physician Office Electronic Medical Record Patient Care Inquiry	3-42
3.4 Cerner Intuition EMR Increases Reimbursement	3-43
3.4.1 Cerner Intuition EMR Optimize Administrative Efficiency	3-43
3.4.2 Cerner Knowledge-Driven Care	3-45
3.4.3 Cerner Executable Knowledge®	3-45
3.4.4 Cerner Knowledge Infrastructure	3-46
3.4.5 Cerner Outcomes Management	3-46
3.5 Eclipsys Sunrise Health Information Record Manager	3-47
3.5.1 Eclipsys Sunrise™ eLink Enterprise Application Integration	3-49
3.5.2 Eclipsys Sunrise™ eLink Enterprise Application Integration EAI Platform Support	3-50
3.5.3 Eclipsys Sunrise™ eLink Enterprise Application Integration EAI Data Definition	3-51
3.5.4 Eclipsys EMR	3-52
3.6 iSOFT Lorenzo Patient Care Systems	3-52
3.6.1 iSOFT Lorenzo Based on International Standards And Open Technologies	3-54
3.7 Epic Systems EHealth Physician Office Medical Record	3-55
3.8 Siemens Electronic Health Record	3-57
3.8.1 Siemens MedSeries4® Repository	3-57
3.8.2 Siemens Online Medical Record	3-58
3.9 Misys Physician Office Electronic Medical Records System	3-61
3.9.1 Misys EMR: Features and Benefits	3-61
3.9.2 Misys EMR Clinical Data for Physician Practices	3-65
3.10 QuadraMed Physician Office Electronic Patient Record	3-66
3.10.1 QuadraMed Plans of Care Tailored to Patient Needs	3-69
3.11 MDS Medical / Allscripts Electronic Health Records Software	3-69
3.11.1 TouchChart Base Medical Document Management	3-72
3.11.2 MDS Medical / Allscripts TouchChart™ EMR Software	3-73
3.12 CPSI Physician Electronic Medical Record System	3-74
3.13 SOAPware	3-76
3.14 MediNotes e Electronic Medical Record Software	3-84
3.14.1 MediNotes Practice View	3-85
3.14.2 MediNotes Object View	3-85

**PHYSICIAN OFFICE ELECTRONIC MEDICAL RECORD (EMR) SYSTEMS TECHNOLOGY**

<b>4. HEALTHCARE ELECTRONIC MEDICAL RECORD (EMR) SYSTEMS TECHNOLOGY</b>	<b>4-1</b>
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
4.1.4 Regional Health Information Organizations	4-3
4.2 Hospital and Physician Practice Market Conditions	4-5

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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 Model	Database 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

## PHYSICIAN OFFICE ELECTRONIC MEDICAL RECORD COMPANY PROFILES

HOSPITAL INFORMATION SYSTEM ELECTRONIC MEDICAL RECORD PROFILES		COMPANY
		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
5.3.14	Cerner Healthcare Devices	5-21

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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 32	2006 Revenue 5-
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 And Share Health Data Repository (HDR), While Workflows Of Different Environments	Same Architecture Being Customized For The 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

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 software LSS Improvements Focus on Quality, Integration	Management 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 PHYSICIAN OFFICE ELECTRONIC MEDICAL RECORD MARKET EXECUTIVE SUMMARY**

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

**PHYSICIAN OFFICE MEDICAL RECORDS INFORMATION SYSTEMS MARKET DESCRIPTION AND MARKET DYNAMICS**

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

**PHYSICIAN OFFICE ELECTRONIC MEDICAL RECORD EMR INFORMATION SYSTEMS MARKET SHARES AND MARKET FORECASTS**

Table 2-1 Physician Office Electronic Medical Record Market Driving Forces	2-2
Table 2-2 Physician Office Electronic Medical Record IT Solution Features	2-3
Figure 2-3 Worldwide Physician Office Electronic Patient Record Systems: EPR Market Shares, Dollars, First Three Quarters 2007	2-5
Table 2-4 Worldwide Physician Office Electronic Patient Record Systems: EPR Market Shares, Dollars, First Three Quarters 2007	2-6
Table 2-5 Worldwide Healthcare Information Systems: EPR Electronic Patient Record Market Shares, Dollars, 2007	2-7
Figure 2-6 Worldwide Healthcare Information Systems: Enterprise EPR Electronic Patient Record Market Shares, Dollars, 2006	2-8
Table 2-7 Healthcare Information Systems: Enterprise EPR Electronic Patient Record Market Shares, Dollars, 2006	2-9
Table 2-8 Healthcare Information Systems: Enterprise EPR Electronic Patient Record Market Shares, Dollars, 2006	9
	9
	2-11

Worldwide Physician Office Electronic Patient Record (EMR) License Market Forecasts, 2008-2013	11
Table 2-9	2-12
Worldwide Physician Office Electronic Patient Record Systems: EPR Market Forecasts, 2008-2013	12
Table 2-10	2-13
Worldwide Physician Office Electronic Patient Record (EPR) Services Market Forecasts, 2008-2013	13
Table 2-11	2-14
Worldwide Physician Office Electronic Patient Record (EPR) Total Market Forecasts, 2008-2013	14
Table 2-12	2-15
Worldwide Physician Office Electronic Patient Record Systems: EPR License and Services Market Forecasts, 2008-2013	15
Figure 2-13	2-16
Worldwide Electronic Medical Record (EMR) Systems Shipments and Services Fees, Total Dollars, Market Forecasts, 2007-2013	16
Figure 2-14	2-17
Worldwide Enterprise Electronic Medical Record (EMR) Systems - Large Facilities License Fees, Market Forecasts, Dollars: 2007-2013	17
Figure 2-15	2-18
Worldwide Electronic Medical Record (EMR) Systems For Mid Size and Small Facilities and Physician Practices -- License Fees, Market Forecasts Shipments, Dollars: 2007-2013	18
Figure 2-16	2-20
Worldwide Electronic Medical Record (EMR) Systems -- Market Forecasts Shipments, Total Number of Units, 2007-2013	
Figure 2-17	2-21
Worldwide Electronic Medical Record (EMR) Systems Hospital Facility and Physician Practice Information Systems Market Forecasts Shipments, 2007-2013	
Figure 2-18	2-23
Worldwide Hospital Facilities, Installed Base and Percent Penetration of Robust Electronic Patient Records Systems Forecasts Shipments, 2007-2013	
Figure 2-19	2-24
Worldwide Electronic Medical Record (EMR) Systems For Large Facilities -- Market Forecasts Shipments, Number of Units, 2007-2013	
Figure 2-20	2-26
Worldwide Electronic Medical Record (EMR) Systems For Large Hospitals -- Market Forecasts: Number of Units, 2007-2013	
Figure 2-21	2-27
Worldwide Electronic Medical Record (EMR) Systems For Mid Size and Small Facilities and Physician Practices -- Market Forecasts: Number of Units, 2007-2013	
Figure 2-22	2-28
Worldwide Enterprise Electronic Medical Record (EMR) Mid Size and Small Hospital Mid Range and Small Information Systems Market Forecasts, 2007-2013	
Table 2-23	2-30
Worldwide Enterprise Electronic Medical Record (EMR) Physician	

Group Practice Mid Range Information Systems Market Forecasts, 2007-2013	
Table 2-24	2-31
Worldwide Enterprise Practice Management System Physicians in Practices Forecasts, 2007-2013	
Table 2-25	2-32
Worldwide Enterprise Number of Physician Group Practices Forecasts, 2007-2013	
Figure 2-26	2-33
Worldwide Enterprise Number of Physician Group Practices Forecasts, 2007-2013	
Table 2-27	2-37
McKesson Horizon Practice Analysis Benefits	
Table 2-28	2-39
Siemens Signature Practice Components:	
Table 2-29	2-44
Number of Physicians In Practices, US and Worldwide, 2006	
Table 2-30	2-54
Worldwide Enterprise Physicians in Practices Forecasts, Total Number, 2007-2013	
Table 2-31	2-55
Worldwide Enterprise Physicians in Practices Forecasts, Number in Practices with 25 or More Physicians, 2007-2013	
Table 2-32	2-56
Worldwide Enterprise Physicians in Practices Forecasts, Number in Practices with Less Than 25 Physicians, 2007-2013	
Table 2-33	2-57
Worldwide Enterprise Practice Management System Physicians in Practices Forecasts, 2007-2013	
Figure 2-34	2-59
Worldwide Enterprise Physician Practices Forecasts, Total Number, 2007-2013	
Figure 2-35	2-60
Worldwide Enterprise Physician Practice Forecasts, Number with 25 or More Physicians, 2007-2013	
Figure 2-36	2-61
Worldwide Enterprise Physician Practice Forecasts, Number with Less Than 25 Physicians, 2007-2013	61
Figure 2-37	2-62
Worldwide Enterprise Physician Practice Forecasts, Number Equal To And Greater Than 25 Physicians, Less Than 25 Physicians, And Total 2007-2013	
Table 2-38	2-64
Worldwide Physician Systems For Offices With 25 or More Physicians -- Shipped Unit Market Forecasts, 2007-2013	
Table 2-39	2-65
Worldwide Physician Systems For Offices With Less Than 25 Physicians -- Market Forecasts, Shipped Unit Forecasts, 2007-2013	
Table 2-40	2-66
Worldwide Physician Systems -- Shipped Unit Market Forecasts, Total Number of Units, 2007-2013	
Table 2-41	2-67
Worldwide Enterprise Practice Management Market System	

Shipped Unit Forecasts, 2007-2013 Table 2-42	2-68
Worldwide Enterprise Practice Management Information System Penetration Forecasts, 2007-2013 Table 2-43	2-69
Physician Office Electronic Patient Record Regional Segment Analysis, 2007 In Millions of Dollars Table 2-44	2-70
Physician Office Electronic Patient Record Regional Segment Analysis, Europe, 2007 In Millions of Dollars	

**PHYSICIAN OFFICE ELECTRONIC MEDICAL RECORD PRODUCT DESCRIPTION**

Table 3-1 McKesson's Horizon Comprehensive Physician Electronic Health Records Offering Functions	3-2
Table 3-2 McKesson Horizon Physician Office Patient Folder Electronic Record Functions	3-4
Table 3-3 McKesson Horizon Physician Office Patient Folder Electronic Record Benefits	3-5
Table 3-4 McKesson Horizon Physician Office Performance Manager Benefits	3-7
Table 3-5 McKesson Horizon Patient Portal features	3-8
Table 3-6 McKesson Horizon Patient Portal Benefits	3-10
Table 3-7 McKesson Pathways Regulatory Guidelines Compliance Advisor Benefits	3-12
Table 3-8 McKesson Pathways Contract Management Benefits	3-14
Table 3-9 McKesson Electronic Health Record Benefits	3-16
Table 3-10 GE Centricity Physician Office – EMR Functions	3-18
Table 3-11 Centricity Physician Office – Electronic Medical Record EMR Features	3-19
Table 3-12 GE Centricity physician Office Electronic Medical Records Benefits	3-20
Table 3-13 Meditech Enterprise Medical Record Continuum Of Care Facility types	3-25
Table 3-14 Meditech Physician Office Medical Record Accessibility Features	3-26
Table 3-15 Meditech Enterprise Medical Record Accessibility Features	3-27
Table 3-16	3-28

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Meditech Historical Patient Data Sources	
Table 3-17	3-30
Meditech Electronic Medical Record Patient Care Functions	
Table 3-18	3-31
Meditech Electronic Medical Record Patient Information Categories	
Table 3-19	3-34
Meditech Patient-Oriented Profile Capabilities	
Table 3-20	3-35
Meditech Patient / Physician Alert Capabilities	
Table 3-21	3-36
Meditech Electronic Patient Record Tool Functions	
Table 3-22	3-37
Meditech Electronic Patient Record Graphical Tool Capabilities	
Table 3-23	3-39
Value Of Physician Office Medical Record Electronic Links	
Table 3-24	3-41
Meditech Documentation of Patient Information	
Table 3-25	3-42
Meditech Patient Care Inquiry Functions	
Table 3-26	3-44
Cerner Electronic Patient Records Benefits	
Table 3-27	3-48
Eclipsys Sunrise Health Information Record Manager	
Return On Investment Factors	
Table 3-28	3-59
Siemens Online Medical Record Benefits	
Table 3-29	3-62
Misys EMR: Features and Benefits	
Table 3-30	3-67
QuadraMed Access Management Solutions Functions	
Table 3-31	3-69
MDS MEDICAL / All scripts TouchChart Electronic	
Health Records Software Benefits	
Table 3-32	3-77
SOAPware Included Functionality	

**PHYSICIAN OFFICE 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	

**PHYSICIAN OFFICE 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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