

WINTERGREEN RESEARCH, INC.

**Homecare Information Software and Services Market
Shares, Strategies, and Forecasts, Worldwide, 2010 to 2016**

**Homecare Information Software and Services Provides Care
Delivery and Billing Efficiency**



Picture by Susie Eustis

MOUNTAINS OF OPPORTUNITY

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

www.wintergreenresearch.com

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CHECK OUT THESE KEY TOPICS

Homecare Information Software

Homecare Information Services

Home Health Telephony

Home Health Telephony Integration

Home Health Time Tracking

Home Health Visit Management

Home Health Visit Tracking

Paperless Home Health Aide

Paperless Home Health Visit Tracking

Agency Tools, Collects Payroll, Collects Billing Information, Visit Information, Audited, Payroll, Compliance, Communications, Broadcast Messages, Private Duty, Telephone, Telephony, Ease Of Use, Accurate Data, Home Health Workers, Home Care Telephone, Home Health Telephone, Home Health Telephony, Home Health Time Tracking, Home Health Visit Management, Home Health Visit Tracking, Home Health Software

Translation Software Solutions

Home Health Telephone

Home Health Telepresence

Value Of Homecare Information Systems

OPPORTUNITY ABOUNDS

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LEXINGTON, Massachusetts (January 1, 2010) – WinterGreen Research announces that it has a new study on homecare information software and services. The 2010 study has 497 pages, 184 tables and figures. Worldwide markets are poised to achieve significant growth as the healthcare providers worldwide move to more cost efficient healthcare modalities. Vendors are building out localized direct sales organizations, distribution partnerships, and e-commerce sites that support a home care information systems brand in every region.

Homecare is more cost efficient than nursing home or hospital care, every patient would rather stay at home if possible. As new homecare agencies proliferate in the U.S. and worldwide, one-third of homecare agencies in U.S. markets have closed or been acquired in the past five years due to the economic downturn and lack of profitability.

Challenged with declining reimbursements, a nursing shortage and low productivity even as new agencies open, there has been significant industry consolidation. Automated process brought by homecare information systems addresses management team issues. Existing providers need to improve overall operations to address these issues.

Several new studies provide large-scale, independent, quantified proof of the value of healthcare information technology have. Users can utilize the scheduling notes to alert other staff of patient preferences or supplies needed in the home. Maestro intuitive process flow provides users with many reminders, including when a patient is out of orders, when a supervisory visit is required, or when a procedure needs to be completed during a visit.

Information systems are a significant part of the home care delivery systems. Software leverages the efficiency of clinical process in ways that have never become possible before. The system leverages virtually all the administrative and financial information needed to run a successful home care company. Information can be gathered right from the charts.

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The significance of integration systems is not yet realized in homecare information systems. However, as patients move from one care venue to another, the patient record is going to need to move with them. The hand-held, computer-based system guides home care clinicians through the entire patient care process. Clinicians can use structured record guides. The systems automate reporting. The market opportunity for the homecare information services providers is to enable consolidation of the 35,000 small agencies worldwide into a few large services providers. These few services providers then become customers for the homecare information services systems. Homecare information systems will be enhanced by partnerships with IBM to leverage information analytics systems.

Worldwide homecare information systems markets at \$2 billion in 2009 are expected to reach \$4.8 billion by 2016. Constraints on home healthcare spending in some types of coverage are more than offset by a shift away from nursing home care to assisted living homecare.

YOU MUST HAVE THIS STUDY

Companies Profiled

Market Leaders

McKesson
AllScripts
Cerner
Meditech / Patient Care Technologies
Fujitsu WebCare
Siemens

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Market Participants

Homecare Software Company Profiles
Accounting Systems Technology
Advantage Reimbursement
CareCentric
ContinuLink
Dynatronics
GE Centricity® Solutions
Healthcare Automation
HealthWare
IMA Technologies
Lawson Software + VasTech
Lewis' Financial Services Division
LoginSoft
Medical Computer Systems
Processes, Increasing Efficiency
Networking & Information Services (NIS) Systems
Procura
Profium
QuikPlan Limited
RCS:
Sajix
SAS
Siemens Healthcare
ZirMed:
Government Agencies With Homecare Responsibility

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Report Methodology

This is the 424 st report in a series of market research reports that provide forecasts in communications, telecommunications, the Internet, computer, software, telephone equipment, health equipment, and energy. Automated process and significant growth is a priority in topic selection. 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.

The primary research is conducted by talking to customers, distributors and companies. The survey data is not enough to make accurate assessment of market size, so WinterGreen Research looks at the value of shipments and the average price to achieve market assessments. Our track record in achieving accuracy is unsurpassed in the industry. We are known for being able to develop accurate market shares and projections. This is our specialty.

The analyst process is concentrated on getting good market numbers. This process involves looking at the markets from several different perspectives, including vendor shipments. The interview process is an essential aspect as well. We do have a lot of granular analysis of the different shipments by vendor in the study and addenda prepared after the study was published if that is appropriate.

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 participant 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.

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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 is a central part of the study. Our research includes access to large proprietary databases. Literature search includes analysis of trade publications, government reports, and corporate literature.

Findings and conclusions of this report are based on information gathered from industry sources, including manufacturers, distributors, partners, opinion leaders, and users. Interview data was combined with information gathered through an extensive review of internet and printed sources such as trade publications, trade associations, company literature, and online databases. The projections contained in this report are checked from top down and bottom up analysis to be sure there is congruence from that perspective.

The base year for analysis and projection is 2009. With 2009 and several years prior to that as a baseline, market projections were developed for 2010 through 2016. These projections are based on a combination of a consensus among the opinion leader contacts interviewed combined with understanding of the key market drivers and their impact from a historical and analytical perspective. The analytical methodologies used to generate the market estimates are based on penetration analyses, similar market analyses, and delta calculations to supplement independent and dependent variable analysis. All analyses are displaying selected descriptions of products and services.

This research includes referencde to an ROI model that is part of a series that provides IT systems financial planners access to information that supports analysis of all the numbers that impact management of a product launch or large and complex data center. The methodology used in the models relates to having a sophisticated analytical technique for understanding the impact of workload on processor consumption and cost.

WinterGreen Research has looked at the metrics and independent research to develop assumptions that reflect the actual anticipated usage and cost of systems. Comparative analyses reflect the input of these values into models.

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The variables and assumptions provided in the market research study and the ROI models are based on extensive experience in providing research to large enterprise organizations and data centers. The ROI models have lists of servers from different manufacturers, Systems z models from IBM, and labor costs by category around the world. This information has been developed from WinterGreen research proprietary data bases constructed as a result of preparing market research studies that address the software, energy, healthcare, telecommunications, and hardware businesses.

Homecare Information Software and Services Market Shares, Strategies, and Forecasts, Worldwide, 2010 to 2016

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WINTERGREEN RESEARCH, HAS A UNIQUE RESEARCH STRATEGY THAT RELATES TO IDENTIFYING MARKET TRENDS THROUGH READING AND INTERVIEWING OPINION LEADERS. BY READING THE ELECTRONIC EQUIVALENT OF 40 FEET OF PAPER, WINTERGREEN RESEARCH SENIOR ANALYSTS CAN LEARN A LOT MORE ABOUT MARKETS, A LOT FASTER THAN CAN BE LEARNED THROUGH EXPENSIVE SURVEYS AND FOCUS GROUPS. THINKING ABOUT MARKET TRENDS IS A HIGH PRIORITY AT WINTERGREEN RESEARCH. AS WITH ALL RESEARCH, THE VALUE PROPOSITION FOR COMPETITIVE ANALYSIS COMES FROM INTELLECTUAL INPUT.

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WINTERGREEN RESEARCH, FOUNDED IN 1985, PROVIDES STRATEGIC MARKET ASSESSMENTS IN TELECOMMUNICATIONS, COMMUNICATIONS EQUIPMENT, HEALTH CARE, INTERNET AND ADVANCED COMPUTER TECHNOLOGY. INDUSTRY REPORTS FOCUS ON OPPORTUNITIES THAT EXPAND EXISTING MARKETS OR DEVELOP MAJOR NEW MARKETS. THE REPORTS ASSESS NEW PRODUCT AND SERVICE POSITIONING STRATEGIES, NEW AND EVOLVING TECHNOLOGIES, AND TECHNOLOGICAL IMPACT ON PRODUCTS, SERVICES, AND MARKETS. MARKET SHARES ARE PROVIDED. LEADING MARKET PARTICIPANTS ARE PROFILED, AND THEIR MARKETING STRATEGIES, ACQUISITIONS, AND STRATEGIC ALLIANCES ARE DISCUSSED. THE PRINCIPALS OF WINTERGREEN RESEARCH HAVE BEEN INVOLVED IN ANALYSIS AND FORECASTING OF INTERNATIONAL BUSINESS OPPORTUNITIES IN TELECOMMUNICATIONS AND ADVANCED COMPUTER TECHNOLOGY MARKETS FOR OVER 30 YEARS.

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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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