

WINTERGREEN RESEARCH, INC.

**Homecare Information Systems Market Opportunities,  
Strategies, and Forecasts, 2006 to 2012**

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**Homecare Information 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**

**Homecare Information Systems Market Shares**  
**HOME CARE INFORMATION SYSTEMS MARKET FORECASTS**  
**Homecare Information Systems Market Driving Forces**

**Market Description and Dynamics**

Home Care Services Billing Issues  
Prospective Payment System (PPS)  
Need For Automation Of Home Care Companies  
Managed Care Requirements  
Treatment Trends  
Market Drivers For Healthcare Cost Containment  
Managed Care Change In The Healthcare Industry  
Delivery Of Non-Acute Health Care  
Increased Need For Information Technology  
Integrated Healthcare Information Technology Solutions

***OPPORTUNITY ABOUNDS***

**WinterGreen Research, Inc.**  
**Lexington, Massachusetts**  
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## **Homecare Information Systems Market Opportunities, Market Forecasts, and Market Strategies, 2006-2012**

The third quarter of 2005 continued a trend of positive developments in the healthcare information technology marketplace. A significant development was the publication of RAND's peer-reviewed study that indicates healthcare information technology could save the country's healthcare system \$162 billion annually through improved efficiency, disease management and reduced adverse drug events. This study provides large-scale, independent, quantified proof of the impact healthcare information technology can have.

Information systems are emerging as 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.

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.

McKesson is the worldwide leader in homecare information systems. Worldwide homecare medical information systems market shares markets are illustrated in Figure ES-2. McKesson is the worldwide leader with 34% market share and Mysis HCIS leads in the U.S. with 26% market share.

Cerner BeyondNow Technologies and Patient Care Technologies are the number three and four market participants with 11% market share and Siemens / Novis the number five market participant with 8% share. Fujitsu is a market share market participant with 6% with measurable share.

## Companies Profiled

### Market Leaders

McKesson  
Mysis HCIS

### Market Participants

Cerner  
Siemens/Novis  
Fujitsu

Meditech  
GE

## Homecare Information Systems Strategies and Forecasts, 2006-2012

### REPORT METHODOLOGY

THIS IS THE 270TH 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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