

WINTERGREEN RESEARCH, INC.

**Nursing Home and Long-Term Care Information Systems
Market Opportunities, Strategies, and Forecasts, 2006 to 2012**

Nursing Home and Long-Term Care Information Systems



Picture by Susie Eustis

MOUNTAINS OF OPPORTUNITY

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

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NURSING HOME AND LONG-TERM CARE INFORMATION SYSTEMS MARKET SHARES
NURSING HOME AND LONG-TERM CARE INFORMATION SYSTEMS MARKET
FORECASTS

Nursing Home or Skilled Nursing Facility

Nursing Home and Long-Term Care Information Systems ROI

Private Vs. Public Nursing Homes

Nursing Home Information Technology Industry

WORLDWIDE NURSING HOME INFORMATION SYSTEMS MARKET DISTRIBUTION

NURSING HOME CARE OPTIONS

NURSING HOME INFORMATION SYSTEMS REQUIREMENTS

COORDINATING NURSING HOME ACTIVITIES VIA EAI

NURSING HOME INFORMATION SYSTEMS TOOLKITS

WEB SERVICES

NURSING HOME INFORMATION SYSTEMS SERVICES

STATE-OF-THE-ART SECURITY

NURSING HOME INFORMATION SYSTEMS PRODUCT TECHNOLOGY

HEALTH INSURANCE PORTABILITY & ACCOUNTABILITY ACT (HIPAA)

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Nursing Home and Long-Term Care 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.

Homecare information systems are positioned to connect business: clinical activities, billing/financial, and management decisions. Table ES-1 illustrates homecare business integration.

TABLE ES-1 HOMECARE BUSINESS INTEGRATION

- **Clinical activities**
- **Billing**
- **Financial**
- **Care management decisions**

Source: WinterGreen Research, Inc.

Return On Investment (ROI)

Home care providers are able to achieve an increase of 37% in administrative productivity after the installation. Presenting technology infrastructure improvement solutions needs to be accompanied by building a business case for solutions. If the technology does not address a business problem then the outcome results in disappointment.

Vendors seek to increase market share in individual domains. They seek to penetrate the existing client base with more functionality. Continued growth is expected in clinical domain systems for specific markets such as nursing, physician office, laboratory, pharmacy, radiology, surgery, emergency medicine and cardiology. As institutions look to restructure and reengineer these high-cost centers, IT promises more efficient operations.

Homecare front end, backend, 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 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.

Worldwide homecare information systems markets at \$285.7 million in 2005 are expected to reach \$1.2 billion by 2012.

Homecare information systems, SOA, services, wireless, records systems market segment forecasts indicate strong growth for the homecare automation markets. The use of an electronic record that creates bills is a basic process efficiency aspect. Markets at \$1.8 billion are expected to reach \$4.8 billion by 2012.

Companies Profiled

Market Leaders

McKesson
Meditech
Cerner

Market Participants

Accumedic Computer Systems	Care Facts
American Health Care Software Enterprise	Eclipsys
Fujitsu	ViTel Net
Golden Rule Software	Green Mountain Software
Hann's On Software	MDI
Misys Healthcare Systems	Patient Care Technologies
Procura	Siemens
GE Portable Homecare Medical Information Systems	

Nursing Home and Long-Term Care Information Systems Strategies and Forecasts, 2006-2012

REPORT METHODOLOGY

THIS IS THE 276TH 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

Nursing Home and Long-Term Care Information Systems Market Opportunities, Strategies, and Forecasts, 2006 to 2012

Table of Contents

NURSING HOME AND LONG-TERM CARE INFORMATION SYSTEMS EXECUTIVE SUMMARY

NURSING HOME AND LONG-TERM CARE INFORMATION SYSTEMS EXECUTIVE SUMMARY	ES-1
Nursing Home and Long-Term Care Information Systems	ES-1
Return On Investment (ROI)	ES-4
Nursing Home and Long-Term Care Information Systems Market Shares	ES-4
Nursing Home and Long-Term Care Information Systems Market Forecasts	ES-6

NURSING HOME AND LONG-TERM CARE INFORMATION SYSTEMS MARKET DESCRIPTION AND MARKET DYNAMICS

1. NURSING HOME AND LONG-TERM CARE FACILITY INFORMATION SYSTEMS MARKET DESCRIPTION AND MARKET DYNAMICS	1-1
1.1 Nursing Home Or Skilled Nursing Facility	1-1
1.1.1 Trends	1-1
1.2 Private Versus Public Nursing Homes	1-2
1.3 Information Technology Solutions	1-3
1.4 Nursing Home and Long-Term Care Facility Information System Software Market Shifts	1-3
1.4.1 Characteristics Particular To The Nursing Home Information System Market	1-7
1.4.2 Implementation Depends On Documentation Of Each Discipline Needs	1-8
1.4.3 Nursing Home Services Billing Issues	1-8
1.4.4 Prospective Payment System (PPS)	1-10
1.4.5 Managed Care Requirements	1-10
1.4.6 Oasis Home Health Agencies	1-13
1.5 Need For Automation Of Nursing Home Companies	1-14
1.6 Nursing Home Information Technology Industry	1-17
1.6.1 History Of Low Investment In Healthcare Information Technology	1-19
1.6.2 Market Driving Forces For Worldwide Nursing Home Information Systems	1-20
1.6.3 Treatment Trends	1-20
1.6.4 Home Healthcare Delivery Industry	1-22
1.6.5 Competition Forms Basis Of U.S. Medical Care Services Delivery	1-22
1.6.6 Science And Medical Technology	1-24
1.7 Market Drivers For Healthcare Cost Containment	1-25
1.7.1 Managed Care Organization Impact	1-26
1.8 Reasons Home Health Care Has Gained Wide-Spread Acceptance	1-26
1.8.1 Managed Care Change In The Healthcare Industry	1-26
1.8.2 Nursing Home For People With Long Term Disabilities	1-27
1.9 Worldwide Nursing Home Information Systems Market Distribution	1-28
1.9.1 Delivery Of Non-Acute Health Care	1-28
1.9.2 Leveraging Distribution Channels	1-29
1.9.3 Worldwide Nursing Home Information Systems Market Positioning	1-29
1.10 Increased Need For Information Technology	1-32
1.10.1 Medical Error	1-32

1.11	Shortcomings Of Traditional Healthcare Information Systems	1-33
1.12	Nursing Home Information Systems Market Strategy	1-34
1.12.1	Integrated Healthcare Information Technology Solutions	1-35
1.12.2	Flexible Product-Delivery Options	1-36
1.12.3	Leveraging Existing Customer Base	1-36
1.13	Nursing Home Information Systems Market Trends	1-37
1.13.1	Clinician Support For Spending Less Time At The Desktop And More Time Taking Care Of Patients	1-39
1.14	Nursing Home Ownership	1-39
1.15	Nursing Home Care Options	1-40
1.15.1	Nursing Home Care Delivery Approach	1-40
1.16	Nursing Home Issues Relating To Implementing An EAI Solution	1-41
1.17	Coordinating Nursing Home Activities Via EAI	1-43
1.17.1	Infrastructure Value	1-43
1.17.2	Value Of Integration	1-44
1.17.3	Reducing Costly Errors	1-44
1.17.4	Maximizing Operational Efficiency	1-45
1.17.5	Faster Time to Market	1-45
1.17.6	Improved Employee Productivity	1-46
1.17.7	Connecting Enterprise Applications	1-47
1.17.8	Linking Internal Operations	1-48

NURSING HOME AND LONG-TERM CARE INFORMATION SYSTEMS MARKET SHARES AND MARKET FORECASTS

2. NURSING HOME AND LONG-TERM CARE INFORMATION SYSTEMS MARKET SHARES AND MARKET FORECASTS	2-1
2.1 Opportunity for Growth Exists in Nursing Home Healthcare Information Technology	2-1
2.1.1 Nursing Facility Services Funded By Medicare And Medicaid	2-4
2.2 Nursing Home Information Systems Market Shares	2-4
2.2.1 McKesson Horizon Nursing Home Care	2-7
2.2.2 Cerner	2-8
2.2.3 Meditech Nursing Home and Long-Term Care Information System	2-8
2.2.4 Meditech Multi-Facility Health Care Positioning	2-9
2.2.5 Siemens	2-10
2.3 Nursing Home Information System Segment and Facility Analysis	2-10
2.3.1 Nursing Home Facility Analysis	2-12
2.4 Nursing Home and Long-Term Care Information Systems Market Forecasts	2-14
2.4.1 Health Behaviors and Risk Factors	2-21

NURSING HOME AND LONG-TERM CARE INFORMATION SYSTEMS PRODUCT DESCRIPTION

3. NURSING HOME AND LONG-TERM CARE INFORMATION SYSTEM PRODUCT DESCRIPTION	3-1
3.1 Cerner	3-1
3.1.1 Cerner Long-term and Nursing Home Healthcare Information Technology Market	3-1
3.1.2 Cerner Nursing Scheduling Modules	3-2
3.1.3 Cerner Staff Scheduling Solution	3-2
3.1.4 Cerner Long-Term and Nursing Home Healthcare Information Technology Online Documentation	3-4
3.1.5 Cerner Long-Term and Nursing Home Healthcare Information Technology Healthcare System Is Undergoing Fundamental Change	3-5
3.1.6 Cerner Long-Term and Nursing Home Healthcare Information Technology Structure the Knowledge	3-6

3.1.7	Cerner Solutions Store Healthcare Data And Provide A Framework For Comparability	3-6
3.1.8	Cerner Nursing Home And Long-Term Care Solutions Strategy	3-7
3.1.9	Cerner Computerized Physician Order Entry (CPOE)	3-8
3.1.10	Cerner PowerPOC	3-9
3.2	MDI Technologies	3-9
3.2.1	MDI	3-10
3.2.2	MDI Technologies On-Line Advantage Family	3-10
3.2.3	MDIConnect Internet Solution	3-10
3.2.4	MDIConnect Increased Efficiency of Data Management	3-11
3.2.5	MDIConnect HIPAA Compliant Security	3-11
3.2.6	MDIConnect State-of-the-Art Commitment	3-12
3.3	Misys Nursing Home Healthcare Systems	3-12
3.3.1	Misys Nursing Home CPOE	3-13
3.3.2	Misys Electronic Medical Records EMR	3-15
3.4	Eclipsys	3-16
3.4.1	Eclipsys Computerized Physician Order Entry (CPOE)	3-16
3.4.2	Eclipsys Performance at the Point of Care	3-17
3.4.3	Eclipsys Order Entry System in Healthcare	3-17
3.4.4	Eclipsys Clinical Decision Support	3-18
3.4.5	Eclipsys Sunrise Consistent, Yet Flexible, Documentation	3-18
3.4.6	Eclipsys Sunrise Patient Acuity as a By-Product of Documentation	3-19
3.4.7	Eclipsys Sunrise Integrated Data Meaningful Reports	3-30
3.4.8	Eclipsys Sunrise Streamlined Workflows	3-30
3.5	GE Healthcare Nursing Home Systems	3-31
3.5.1	GE Healthcare Information System Nursing Home Implementation Process	3-35
3.5.2	GE RecordsTFC™ System	3-36
3.6	Meditech Nursing Home and Long-Term Care Information System	3-37
3.6.1	Meditech Multi-Facility Health Care Positioning	3-38
3.6.2	Meditech Software Modules	3-39
3.6.3	Meditech Enterprise Medical Record	3-44
3.6.4	Meditech Current Care/Clinical Information	3-47
3.6.5	Meditech Historical Patient Data	3-48
3.6.6	Meditech Outpatient Information	3-48
3.6.7	Meditech Photographic Patient Identification	3-50
3.6.8	Meditech On-Line Ordering and Electronic Signature	3-51
3.6.9	Meditech Confidential Records of Care	3-52
3.6.10	Meditech Electronic Medical Record Patient Care	3-52
3.6.11	Meditech Patient-Oriented Profiles	3-56
3.6.12	Meditech Enterprise Medical Record Patient Care System	3-61
3.6.13	Meditech Patient Care Management	3-63
3.6.14	Meditech Patient Care Management Clinical Content	3-64
3.6.15	Meditech Documentation of Patient Information	3-66
3.6.16	Meditech Reporting and Printing Capabilities	3-69
3.6.17	Meditech Nursing Application	3-71
3.6.18	Meditech Enterprise Medical Record (EMR)	3-83
3.6.19	Meditech Graphical Display of Data	3-87
3.6.20	Meditech On-Line Ordering and Electronic Signature	3-87
3.6.21	Meditech Patient Care Inquiry (PCI)	3-88
3.7	IDX Carecast	3-91
3.7.1	IDX® Carecast™	3-93
3.8	Siemens Clinical Manager	3-94
3.8.1	Siemens PDAccess™ Clinical Assistant	3-95

3.8.2	Siemens Electronic Health Record	3-96
3.8.3	Siemens Med Administration Check™	3-97
3.8.4	Siemens Med Administration Check Streamlines Process	3-97
3.8.5	Siemens Medical Medication Management Pharmacy Solutions	3-100
3.8.6	Siemens Med Administration Check™	3-100
3.9	McKesson Enterprise Project Management	3-102
3.9.1	McKesson HorizonWP Physician Portal	3-102
3.9.2	McKesson Horizon Nursing Home Care	3-105

NURSING HOME INFORMATION SYSTEMS TECHNOLOGY

4. NURSING HOME INFORMATION SYSTEMS TECHNOLOGY	4-1
4.1 Nursing Home Information Systems Requirements	4-1
4.1.1 Internet Protocol (IP) Mission Critical Functionality	4-5
4.2 Nursing Home Information Systems Toolkits	4-6
4.2.1 Process Management Toolkits	4-8
4.3 Nursing Home Information Systems -Services	4-11
4.4 Internet	4-17
4.4.1 Upgrading Software	4-18
4.4.2 End-To-End Flow From The Security Viewpoint	4-18
4.4.3 Nursing Home Information Systems Services Security Policy Configuration	4-19
4.4.4 Role Of Mission Critical Middleware Messaging	4-22
4.4.5 IBM Mission-Critical Functionality	4-23
4.4.6 IBM WebSphere MQ Messaging Software	4-25
4.4.7 Linking Internal Operations	4-25
4.5 Nursing Home Information Systems Product Technology	4-28
4.5.1 Windows Interface	4-29
4.5.2 SQL Server	4-29
4.5.3 Misys Caché	4-29
4.5.4 Server Monitor	4-30
4.5.5 Field Synchronization	4-30
4.6 State-Of-The-Art Security	4-31
4.6.1 Misys Portal and Document Manager Module	4-31
4.7 Cerner Technologies Reusable Programming Elements	4-32
4.8 Testing Services As An Extension Of Nursing Home	4-32
4.8.1 HL7 Interface & Accounting Exports	4-33
4.9 Web Services	4-33
4.9.1 Services Guarantee Compliance	4-34
4.9.2 Outcomes Monitoring	4-35
4.9.3 Web Services Key Standards	4-35
4.9.4 Web Services Definition	4-36
4.10 Web Services Architecture	4-38
4.11 Distributed Service Discovery Methods	4-40
4.11.1 Web Services Positioning	4-41
4.12 OASIS	4-42
4.13 SOAP	4-43
4.13.1 SOAP Framework	4-43
4.13.2 Framework For Developing Web Services	4-44
4.13.3 Apache SOAP	4-44
4.13.4 Load Balancer With SSL Support	4-45
4.13.5 Points Of Failure	4-45
4.13.6 SOAP Limitations	4-46
4.13.7 SOAP Protocol Uses Multi-Step Process	4-47

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4.13.8	Framework Benefits	4-47
4.13.9	SOAP Test Strategies	4-47
4.13.10	SOAP Solutions	4-49
4.14	WSDL	4-50
4.14.1	WSDL Service Descriptions	4-51
4.15	UDDI Registry	4-52
4.15.1	UDDI Test Registries	4-52
4.15.2	UDDI Distributed Web Service Discovery	4-53
4.15.3	UDDI Consortium	4-54
4.15.4	WS-Inspection Document Extensibility	4-54
4.16	Language XSLT	4-55
4.17	Middleware Definition	4-56
4.17.1	Key Missions Of EAI Integration Middleware	4-57
4.17.2	Continued Demand For Business Integration Software	4-60
4.17.3	WebSphere Business Integration for Healthcare Collaborative Network	4-63
4.18	Sun / SeeBeyond Single Patient View	4-65
4.19	Health Insurance Portability and Accountability Act (HIPAA)	4-71
4.19.1	HIPAA Solution For Healthcare Organizations From IBM	4-72
4.19.2	HIPAA Financial Advantage	4-76

NURSING HOME AND LONG-TERM CARE INFORMATION SYSTEMS COMPANY PROFILES

5. NURSING HOME AND LONG-TERM CARE INFORMATION SYSTEMS COMPANY PROFILES	5-1	
5.1	Accumedic Computer Systems	5-1
5.1.1	Accumedic Medical Practice Management Software Solutions	5-2
5.2	American Health Care Software Enterprises	5-4
5.3	CareFacts	5-5
5.4	Cerner (NASDAQ: CERN)	5-6
5.4.1	Cerner Corporation: Taking the Paper out of Healthcare	5-8
5.4.2	Cerner / BeyondNow Technologies	5-10
5.4.3	Cerner Strategy	5-11
5.4.4	Cerner Expanding Presence In Home Healthcare Market	5-15
5.4.5	Cerner Revenue	5-16
5.5	Eclipsys	5-19
5.6	Fujitsu	5-20
5.6.1	Fujitsu Homecare Information Systems	5-21
5.6.2	Fujitsu Network Communications	5-22
5.6.3	Fujitsu Considers WiMAX vs. 3G vs. Wi-Fi	5-23
5.6.4	Fujitsu FLASHWAVE® 7500 Small System	5-24
5.6.5	Fujitsu FASST Transition Solutions	5-24
5.6.6	Fujitsu Microelectronics America	5-24
5.6.7	Fujitsu Network Communications Inc.	5-25
5.6.8	Fujitsu Revenue	5-25
5.6.9	Fujitsu Business Segment Results	5-26
5.7	GE Portable Homecare Medical Information Systems	5-29
5.7.1	GE Healthcare Acquisition of IDX Systems	5-30
5.7.2	GE Healthcare	5-32
5.7.3	GE / IDX Systems	5-33
5.7.4	IDX Web Strategy	5-35
5.7.5	IDX Information Systems	5-35
5.7.6	IDX Strategy	5-35
5.7.7	IDX Web Strategy	5-38
5.7.8	IDX Systems Revenue	5-38

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5.8	Golden Rule Software	5-40
5.9	Green Mountain Software	5-42
5.10	Hann's On Software	5-42
5.11	McKesson	5-43
5.11.1	McKesson Information And Care Management Products	5-44
5.12	MDI	5-47
5.12.1	MDI On-Line Advantage Full Integration	5-48
5.13	Meditech	5-49
5.13.1	Meditech Client / Server Platform	5-49
5.13.2	Meditech Client / Server Benefits	5-50
5.13.3	Meditech's Desktop Access to the Internet	5-51
5.13.4	Meditech Increased Processing Power	5-51
5.13.5	Meditech Internet Access Feature	5-52
5.13.6	Meditech System Monitoring Tool: Alert	5-52
5.13.7	Medical Information Technology Revenue	5-54
5.13.8	Meditech Integrated Software Solutions	5-56
5.14	Misys Healthcare Systems	5-58
5.14.1	Misys plc (FTSE: MSY)	5-58
5.14.2	Misys Healthcare Systems' Home Health Solution Benefits	5-59
5.14.3	Misys Homecare Customers	5-60
5.15	Patient Care Technologies	5-61
5.16	Procura	5-63
5.16.1	Procura Health Management System	5-63
5.17	Siemens	5-64
5.17.1	Siemens Home Health Solutions Customer Base:	5-65
5.17.2	Siemens Research and Development	5-67
5.17.3	Siemens Information and Communication Networks	5-67
5.17.4	Siemens Information and Communication Mobile Group	5-68
5.18	ViTel Net	5-69

List of Tables and Figures

NURSING HOME AND LONG-TERM CARE INFORMATION SYSTEMS EXECUTIVE SUMMARY

Table ES-1	ES-3
Nursing Home Healthcare Information Technology Market Driving Forces	
Figure ES-2	ES-5
Worldwide Nursing Home and Long-Term Care Market Shares, Shipments, Dollars, 2005	
Figure ES-3	ES-6
Worldwide Nursing Home and Long-Term Care Information System Market Forecasts, Dollars, 2006-2012	

NURSING HOME AND LONG-TERM CARE INFORMATION SYSTEMS MARKET DESCRIPTION AND MARKET DYNAMICS

Table 1-1	1-4
Nursing Home Information System Software Characteristics	
Table 1-2	1-7
Market Characteristics For Evaluation of Nursing Home Information System Software Vendors	
Table 1-3	1-9
Nursing Home Services Billing Issues	
Table 1-4	1-11
JCAHO ORYX Requirements	
Table 1-5	1-15
Nursing Home Standard Services Provided	
Table 1-6	1-16
Nursing Home Specialty Services Provided	
Table 1-7	1-18
Home Market Information System Software Market Segment	
Table 1-8	1-21
Factors Relating To Value Of Home Health Care Over Institutional Care	
Table 1-9	1-30
Worldwide Nursing Home Information Systems Market Positioning	
Table 1-10	1-35
Strategies For Offering Technology Solutions To The Home Healthcare Industry	
Table 1-11	1-38
Nursing home Information Systems Market Trends	
Table 1-12	1-40
Nursing Home Care Delivery Approach	

NURSING HOME AND LONG-TERM CARE INFORMATION SYSTEMS MARKET SHARES AND MARKET FORECASTS

Table 2-1	2-3
Nursing Home Healthcare Information Technology Market Driving Forces	
Figure 2-2	2-6
Worldwide Nursing Home and Long-Term Care Market Shares, Shipments, Dollars, 2005	
Table 2-3	2-7
Worldwide Nursing Home Information Systems Market Shares, Shipments, Dollars, 2005	
Figure 2-4	2-11
Worldwide Nursing Home Information Systems Market Segments, Dollars, 2005	

Table 2-5	2-12
Worldwide Nursing Homecare Information Systems Segment Analysis, Shipments, Dollars, 2005	
Table 2-6	2-13
Nursing Facility Analysis 2005	
Figure 2-7	2-14
Worldwide Nursing Home and Long-Term Care Information System Market Forecasts, Dollars, 2006-2012	
Table 2-8	2-16
Worldwide Nursing Home and Long-Term Care Facility Segment Analysis Market Forecasts, Shipments, Dollars, 2006-2012	
Table 2-9	2-17
Worldwide Nursing Home and Long-Term Care Information System Installed Base and Penetration Analysis Market Forecasts, Shipments, Dollars, 2006-2012	
Figure 2-10	2-22
Medicare Nursing Home Analysis by State, by Bed Size	

NURSING HOME AND LONG-TERM CARE INFORMATION SYSTEMS PRODUCT DESCRIPTION

Table 3-1	3-3
Cerner Staff Scheduling Solution	
Table 3-2	3-13
Misys Nursing Home CPOE	
Table 3-3	3-20
Eclipsys Sunrise Patient Acuity Management As A By-Product Of Documentation	
Table 3-4	3-22
Eclipsys Sunrise Patient Acuity Management Benefit	
Table 3-5	3-24
Eclipsys Sunrise Nursing Home Module Key Features	
Table 3-6	3-25
Eclipsys Sunrise Nursing Home Module Key Benefits	
Table 3-7	3-26
Relevant Eclipsys Solutions:	
Table 3-8	3-29
Sunrise Concurrent Care Manager Key Benefits	
Table 3-9	3-32
GE Healthcare Nursing Home Systems Functions	
Table 3-10	3-40
Meditech Software Modules	
Table 3-11	3-44
Meditech Reporting and Decision Support	
Table 3-12	3-45
Meditech Enterprise Medical Record Continuum Of Care Facility Types	
Table 3-13	3-46
Meditech Enterprise Medical Record Accessibility Features	
Table 3-14	3-47
Meditech Enterprise Medical Record Accessibility Features	
Table 3-15	3-48
Meditech Historical Patient Data Sources	
Table 3-16	3-49
Meditech Outpatient Information Sources	

Table 3-17	3-50
Meditech Administrative Data Sources	
Table 3-18	3-51
Meditech EMR Graphical Display Of Data	
Table 3-19	3-53
Meditech Electronic Medical Record Patient Care Functions	
Table 3-20	3-54
Meditech Electronic Medical Record Patient Information Categories	
Table 3-21	3-57
Meditech Patient-Oriented Profile Capabilities	
Table 3-22	3-58
Meditech Patient / Physician Alert Capabilities	
Table 3-23	3-59
Meditech Electronic Patient Record Tool Functions	
Table 3-24	3-60
Meditech Electronic Patient Record Graphical Tool Capabilities	
Table 3-25	3-62
Value Of Enterprise Medical Record Electronic Links To Meditech Enterprise Medical Record	
Table 3-26	3-63
Meditech Patient Care Management PCS Functions	
Table 3-27	3-64
Meditech Patient Care Management Clinical Content	
Table 3-28	3-67
Meditech Documentation of Patient Information	
Table 3-29	3-68
Meditech Medication Administration Record (MAR)	
Table 3-30	3-69
Meditech Reporting and Printing Capabilities	
Table 3-31	3-70
Meditech Reporting and Printing Benefits	
Table 3-32	3-71
Meditech Nursing Application Functions	
Table 3-33	3-72
Meditech Nursing Application Features	
Table 3-34	3-74
Meditech Nursing Application Management of Care Plans Features	
Table 3-35	3-75
Meditech Nursing Application Management of Care Plans Features	
Table 3-36	3-76
Meditech Nursing Application Automated Assessments Features	
Table 3-37	3-78
Meditech Nursing Application Point-of-Care Documentation Features	
Table 3-38	3-78
Meditech Nursing Application Acuity System Features	
Table 3-39	3-80
Meditech Nursing Managing Interventions System Features	
Table 3-40	3-81
Meditech Nursing Scheduling Capabilities System Features	
Table 3-41	3-82
Meditech Nursing Other System Features	
Table 3-42	3-84
Meditech EMR Enterprise Medical Record Functions	

Table 3-43	3-85
Meditech EMR Enterprise Medical Record standard features	
Table 3-44	3-86
Enterprise Medical Record Standard Features	
Table 3-45	3-87
Meditech Graphical Display of Data Functions	
Table 3-46	3-89
Meditech Patient Care Inquiry Functions	
Table 3-47	3-90
Meditech Patient Care Management	
Table 3-48	3-99
Siemens Nursing Home and Long Term Care Med Administration Benefits	
Table 3-49	3-103
McKesson HorizonWP Physician Portal Benefits	
Table 3-50	3-104
McKesson HorizonWP Physician Portal Benefits for Nursing Homes	
Table 3-51	3-106
McKesson Horizon Nursing Home Care Modules:	
Table 3-52	3-107
McKesson Horizon Nursing Home Care Benefits	

NURSING HOME INFORMATION SYSTEMS TECHNOLOGY

Table 4-1	4-3
Nursing Home Information Systems Requirements	
Table 4-2	4-4
Nursing Home Information Systems Functions	
Table 4-3	4-7
Assessment Of Nursing Home Information Systems Services Tool Positioning	
Table 4-4	4-9
Functions Of An IP Addressing Device	
Table 4-5	4-10
Benefits Of an IP Addressing Device	
Table 4-6	4-12
Nursing Home Information Systems Modular Strategy	
Table 4-7	4-13
Nursing Home Information Systems Component Strategy	
Table 4-8	4-14
Nursing Home Information Systems Services Challenge	
Table 4-9	4-15
Internet Market Driving Forces	
Table 4-10	4-16
Internet Nursing home Information Systems Resource Management	
Table 4-11	4-20
Nursing Home Information Systems Services Security Policies Evolution	
Table 4-12	4-21
Server Authentication Mechanisms	
Table 4-13	4-24
Enterprise Messaging Integration Functions	
Table 4-14	4-27
Software Application Integration Functions	

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Table 4-15	4-38
Web Services Common Set Of Standard Protocols	
Table 4-16	4-39
Web Services Architecture	
Table 4-17	4-48
SOAP-Based Web Service Production Environment Testing	
Table 4-18	4-56
XSLT Transformation Of XML	
Table 4-19	4-58
Key Missions Of EAI	
Table 4-20	4-59
EAI Architecture Available From Multiple Vendors	
Table 4-21	4-61
Integration Of Information Resources Benefits	
Table 4-22	4-64
WebSphere Business Integration For Healthcare Collaborative Network Functions	
Table 4-23	4-67
Single Patient View Advantages	
Table 4-24	4-68
Sun SeeBeyond Return on Investment Metrics	
Table 4-25	4-69
Sun Middleware Single Patient View Advantages	
Table 4-26	4-73
The IBM HIPAA solution positioning	
Table 4-27	4-74
IBM HIPAA solution technology	
Table 4-28	4-75
IBM HIPAA Integration Technology Solution Process	
Table 4-29	4-77
HIPAA Technology Achieves Financial Advantage	

NURSING HOME AND LONG-TERM CARE INFORMATION SYSTEMS COMPANY PROFILES

Table 5-1	5-3
Accumedic Medical Practice Management Software	
Table 5-2	5-9
Cerner Healthcare Electronic Patient Record Benefits	
Table 5-3	5-10
Selected Cerner Healthcare Electronic Patient Record Customers	
Table 5-4	5-11
Key Elements Of Cerner Business Strategy	
Table 5-5	5-14
Cerner Domain Specific Systems Functionality In Clinical Markets	
Table 5-6	5-23
Fujitsu Metrics	
Table 5-7	5-28
Fujitsu General Economic And Market Conditions Encountered	
Table 5-8	5-30
GE Portable Homecare Medical Information Systems	
Table 5-9	5-34
IDX Systems Customer Base	

Table 5-10	5-37
IDX Strategy	
Table 5-11	5-41
Golden Rule Software Home Healthcare Handheld Technology	
Table 5-12	5-50
Meditech Client / Server Benefits	
Table 5-13	5-53
Meditech System Monitoring Tool: Alert Components Managed	
Table 5-14	5-57
Meditech Description	
Table 5-15	5-60
Misys Homecare Customers	

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