

HIMSS *Analytics*[®] 7th Annual Ambulatory PM & EHR Study

A view into the world of **Practice Management** and **Electronic Health** **Record adoption**

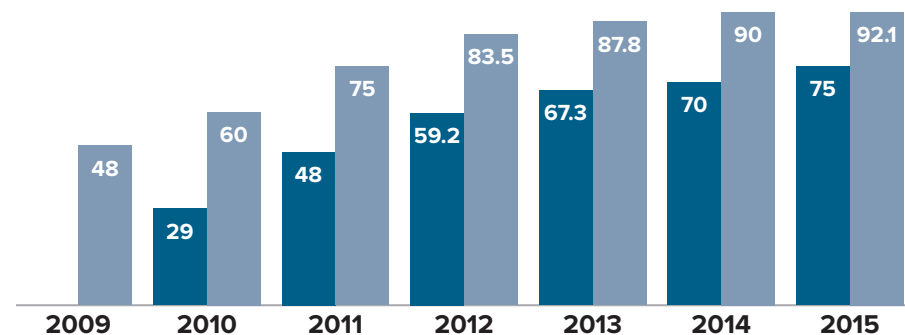
After years of diligently working to adopt EHR solutions, ambulatory physician practices, both hospital-owned and free-standing, find themselves in uncharted waters. In this Essentials Brief, we share insight from over 700 physicians, practice executives, administrators and managers on current adoption, plans to invest, market drivers and strategy around practice management (PM) and electronic health record (EHR) solutions.

Hospital-owned and free-standing ambulatory facilities are nearing universal adoption

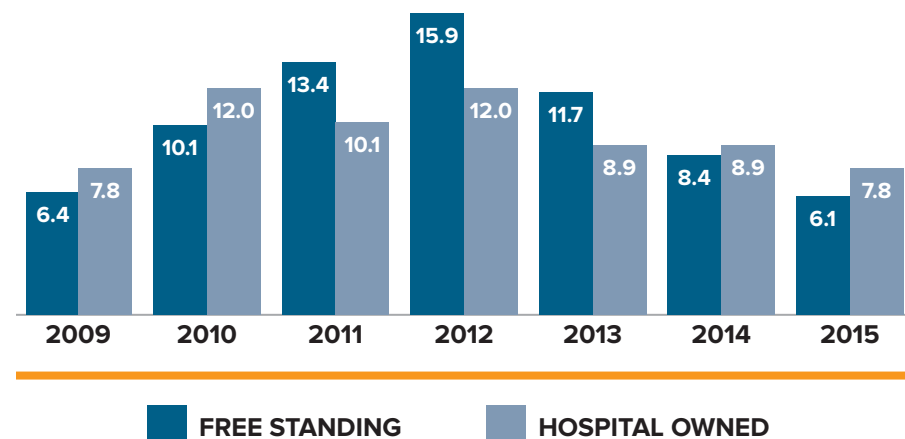
AMBULATORY ORGANIZATIONS HAVE BEEN steadily adopting EHR solutions for years; however, the number of net new solution purchases has been declining since 2012. Now that these organizations have reached near universal adoption, what's next? Maximizing the technological potential of these solutions will certainly be top of mind, but how many ambulatory facilities have plans to replace their current solution and which vendors are they considering?

ADOPTION AT ITS PEAK AND NET NEW PURCHASES ARE SLOWING

Percentage of hospital-owned and free-standing ambulatory facilities with an Ambulatory EHR



Year of EHR acquisition – hospital-owned and free-standing





Which vendors are capturing market share and mindshare in the ambulatory space?

A SNAPSHOT OF VENDOR MARKET SHARE is represented from over 600 ambulatory physician, practice administrator and manager responses. Mindshare is calculated from the nearly 130 ambulatory facilities that plan to purchase net new solutions or replace their current solution.

What is driving ambulatory facilities to purchase new, upgrade or replace their current solution?



FREE-STANDING AMBULATORY FACILITIES with fewer than 10 physicians are beginning to realize the importance an EHR solution's ability to share clinical data between facilities. For larger organizations with more than 10 physicians the focus is on the workflow and creating efficiencies to increase the quality of care they provide.



EMR confidence levels to meet **Meaningful Use Stage 3** criteria and ambulatory strategy around health information exchange and accountable care

WE HAVE TRACKED RESPONDENT CONFIDENCE LEVELS

in their current EHR and their ability to meet different stages of Meaningful Use for the past three years. Find out where ambulatory facilities are in terms of meeting Meaningful Use Stage 2 criteria and the confidence in their EHR vendor's capability to take them further.

Lastly, we focused on health information exchange and accountable care. We reveal the type of HIE ambulatory facilities plan to join and whether these facilities have a strategy around their approach to accountable care.

Other questions asked in this study:

- What is the primary reason for NOT purchasing an Ambulatory PM/EHR?
- Do you plan to purchase net new, replace or upgrade your current Practice Management solution within the next two years?
- Which vendor(s) are you likely to consider when purchasing a new, replacing or upgrading your current PM solution?
- Would you consider replacing your current PM solution with an integrated PM/EHR solution?
- What would cause your organization to replace your current PM/EHR solution?

De-identified, raw data is available with segmentation capabilities around practice physician size and hospital-owned/free-standing designation.



HIMSS Analytics is focused on supplying healthcare IT vendors and providers with relevant data that leads to better decision making. We conduct these studies to provide real-time snapshots of market activity across multiple solutions and initiatives. However, the market's trust is important to us and we will never provide the names of study participants.

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