2016 Essentials Brief

8th Annual Outpatient PM & EHR Solution Study

Snapshot Report

July 2016

HEALTHCARE'S MOST COMPREHENSIVE MARKET INTELLIGENCE RESOURCES & ADVISORY SOLUTIONS

HIMSS Analytics®

HIMSS Analytics® LOGIC™

- HIT Adoption
- Market Opportunity
- Market Share
- Contacts
- Benchmarking

HIMSS Analytics® Advisory Solutions

- Custom Research
- Syndicated Research - Essentials Briefs
- Maturity Model Education Certification

HIMSS Analytics® CapSite™ Database

- Pricing
- Packaging
- Positioning
- Contract Terms

HIMSS Analytics® Advisory Services

- Healthcare Organization Benchmarking
- Advisory Services for Providers
- Certified Educator Programs for Vendors

Vendors Mentioned in this Study

Study Methodology & Demographics

Methodological Approach 1: Web based survey

Dates of Data Collection: June 23, 2016 to July 12, 2016

Target Audience(s): Physicians, practice managers/administrators, practice CEO/President, PAs, NPs, practice IT directors/staff

Number of Respondents: 436

Respondents by Number of Physicians	
Less than 11 Physicians	47.3%
11 to 100 Physicians	18.7%
101 + Physicians	27.9%
Other	5.9%

Practice Type	
Hospital-owned/Tethered practice	46.8%
Free-standing/Untethered practice	53.2%

Methodological Approach 2: HIMSS Analytics® LOGIC™

Date of Database: June 30, 2016

Target Audience(s): Hospital-owned/free-standing outpatient practices

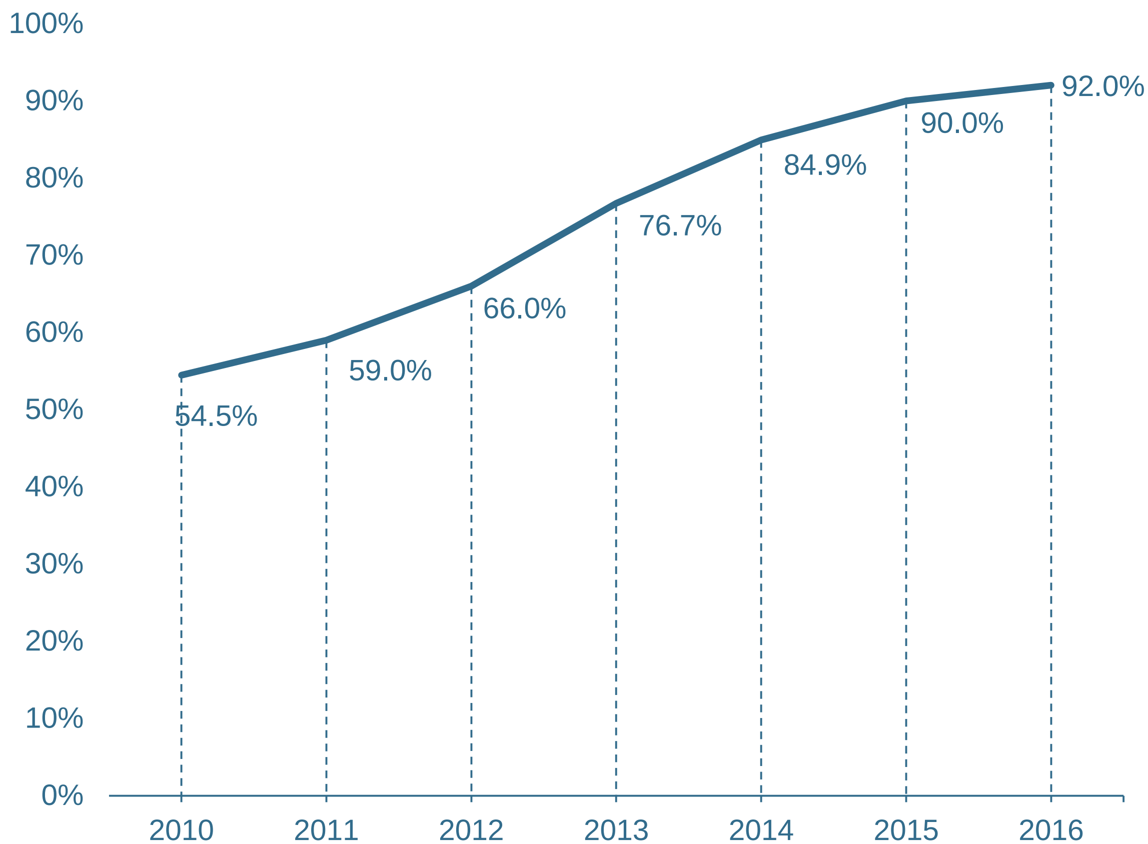
Number of Hospital-Owned Practices: 47,084*

Number of Free-Standing Practices: 57,909*

**Final numbers may vary depending on available IT stack*

Market Penetration: Hospital-Owned EHR Adoption

Has your organization purchased an Outpatient EHR Solution?

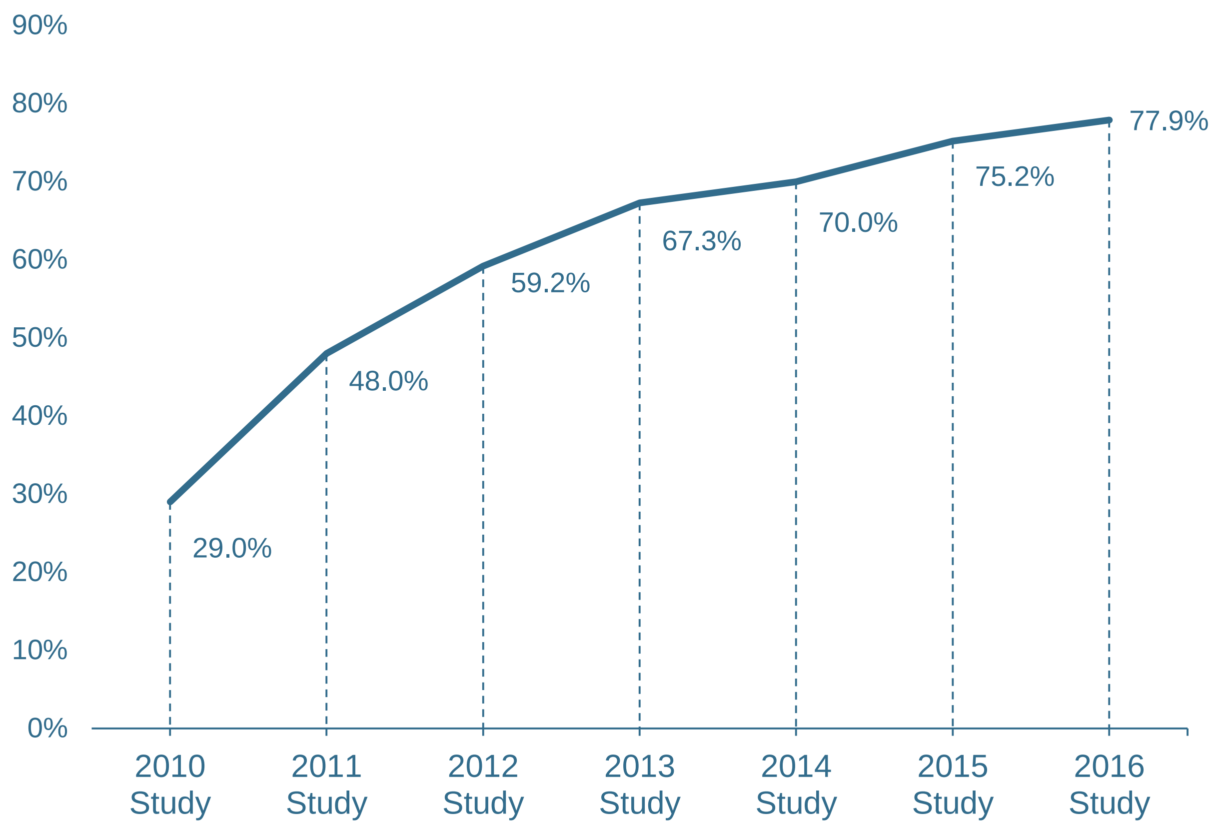


NOTE: Total number of hospital-owned and free-standing outpatient facilities in HIMSS Analytics LOGIC on June 30, 2016 = 47,084
Source: HIMSS Analytics LOGIC

- Given the difference in market penetration between the hospital-owned and free standing outpatient organizations, this report will separate the findings by hospital-owned or free standing organizational structure.
- Data from the June 30 LOGIC Database reveals 92 percent of hospital-owned outpatient facilities have a "live and operational" EMR.
- This data from LOGIC coupled with the study data supports the reasoning that study responses represent current market adoption levels and dynamics.
- Statistics from HIMSS Analytics LOGIC Database and the 2016 Outpatient Study indicate strong growth in the implementation of outpatient EHRs.
- Despite the slight drop in overall market penetration numbers from the Outpatient Study over the 2015-2016 timeframe (from 92 percent to 88 percent), the continued growth and high adoption rates suggest the hospital-owned outpatient market has neared universal adoption.

Market Penetration: Free-Standing EHR Adoption

Has your organization purchased an Outpatient EHR Solution?



- The study reveals nearly 78 percent of respondents representing a free standing outpatient facility report having an EHR
- Adoption of the EHR in the free standing outpatient market has increased roughly 30 percent over the last five years.
- With some physicians on the verge of retirement and choosing not to invest in EHR technology and others who do not feel they need it, the opportunity for adoption in the free standing market is somewhat limited. This indicates near universal adoption across this segment of the market.

Source: 2016 HIMSS Analytics Outpatient PM & EHR Study (N=228)

Vendor Market Share: Hospital-Owned Facilities

Who is your primary Outpatient EHR vendor?

Vendor Market Share: Hospital-Owned Facilities by Practice Size

Who is your primary Outpatient EHR vendor?

Vendor	Total	> 11 Physicians	11 to 75 Physicians	76 + Physicians

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Vendor Market Share: Free-Standing Facilities

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Market Opportunity: Purchase Intentions

Do you have plans to purchase net new, replace or upgrade your current outpatient solution?

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Organization Type	Free-Standing	Hospital-Owned

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Market Opportunity: Vendor Consideration

Which vendor(s) are you likely to consider when purchasing a new, replacing or upgrading your current outpatient EHR solution?

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Market Factors: Purchase Barriers

What is the primary reason for not purchasing an outpatient EHR?

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Additional Information Available in Premium Outpatient PM & EHR Essentials Brief

- Current adoption rates, vendor market share and mind share, as well as market opportunity for the practice management (PM) and electronic health record (EHR) solution market
- Market share breakdown by physician practice size for PM & EHR solutions
- Current and future practice strategic insight across:
  - Health information exchange (HIE)
  - Accountable care (ACO)
  - Solution needs for Clinical Practice Improvement Activities (CPIAs) based upon Medicare Access and CHIP Reorganization Act (MACRA)

Appendix

STAGE	HIMSS Analytics O-EMRAM Outpatient EMR Adoption Capabilities
7	Complete EMR: external HIE, data analytics, governance, disaster recovery
6	Advanced clinical decision support; proactive care management, structured messaging
5	Personal health record, online tethered patient portal
4	CPOE, Use of structured data for accessibility in EMR and internal and external sharing of data
3	Electronic messaging, computers have replaced paper chart, clinical documentation and clinical decision support
2	Beginning of a CDR with orders and results, computers may be at point-of-care, access to results from outside facilities
1	Desktop access to clinical information, unstructured data, multiple data sources, intra-office/informal messaging
0	Paper chart based

For help with leveraging the HIMSS Analytics Outpatient EMR Adoption Model (O-EMRAM) please reach out to the HIMSS Analytics Healthcare Advisory Services Group


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