
2015 HEALTHCARE TECH PURCHASING

Market Share, Mindshare, and Renewal

research and report provided by peer60



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Introduction

US healthcare providers are poised to spend billions in 2015 on information technology. The jobs, promotions, and bonuses of many healthcare professionals depend upon a few key questions.

- Where will this money be spent?
- Which vendors are poised to gain market share?
- Who is poised to miss out?

Over a recent **three week period**, we used our enterprise data platform (Reaction) to find out. We reached out to healthcare leaders and asked about their purchase intentions in 2015. We received feedback from **over 950 decision-makers** representing over a quarter of all hospitals in the United States. Over 80% of these hospital leaders were C-level executives with the remainder still having titles like Vice President, Department Head or Director.

The result is a sample that represents approximately **25% of the US Healthcare system** - easily large enough to project where the market is going.

You can see the titles of hospital leaders and the facilities represented in appendixes A & B respectively.

About Industry Insights

You will notice that this report is very different from one you would purchase (for significant money) from a market research firm. Those reports use a small amount of data to generate a lot of analysis.

In contrast, we believe that large amounts of data will make the analysis easy. Our team will provide some limited insights within this report, but there will be many conclusions the data points to that we won't mention. We strongly recommend reviewing the data specific to your space and analyzing it closely to draw your own conclusions.

If there is a chart, cross tab, or pivot table that you want to see but isn't in this report, feel free to reach out to Jeremy Bikman (jbikman@peer60.com). Our team can pull additional data for you.

Jeremy Bikman

Email: jbikman@peer60.com

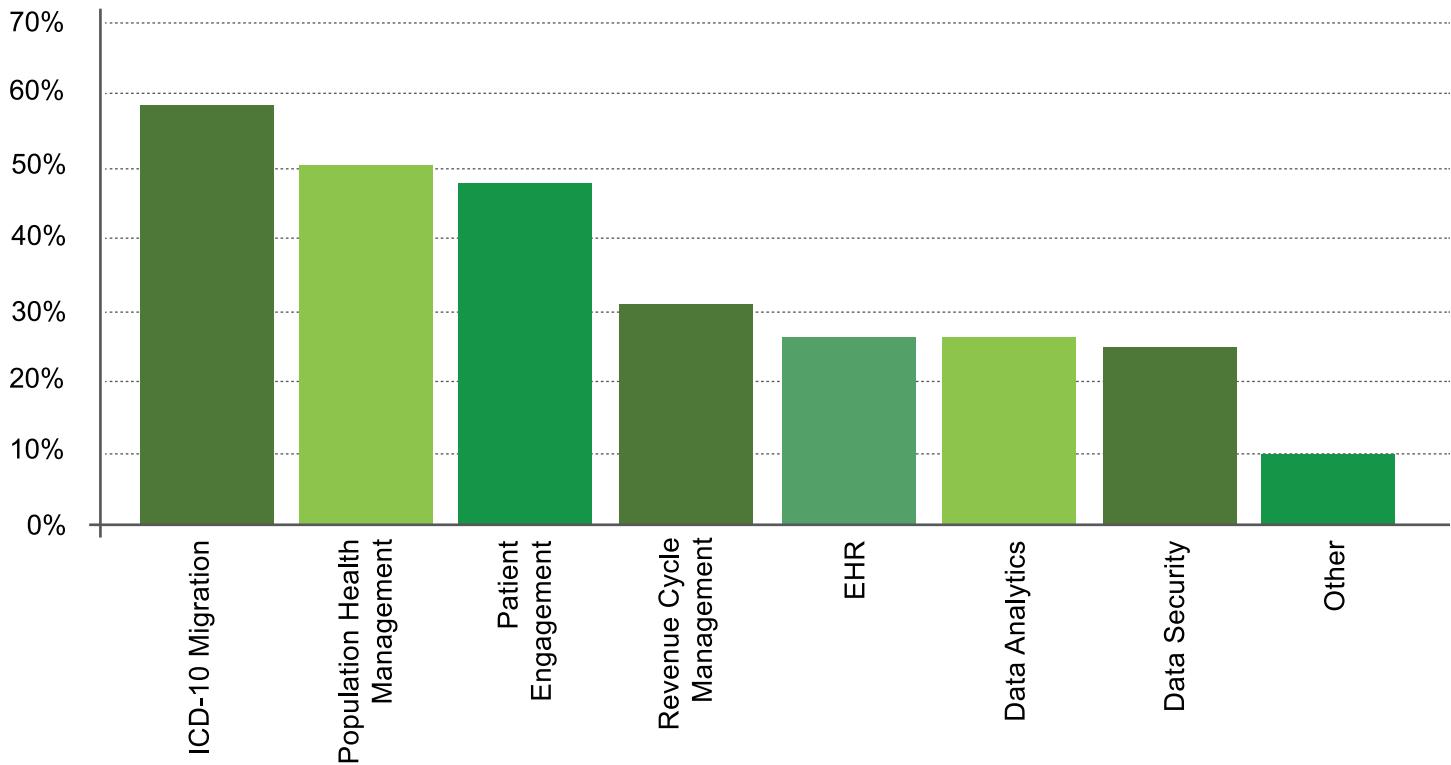
www.peer60.com/lets-talk

2015 Purchases

2015 is poised to be the year of ICD-10 Migration. Nearly 60% of all hospital leaders said their facility will address ICD-10 in the coming year. This number jumps up over 70% among many groups who will work with it specifically (more than 70% of CFOs, CIOs, CMIOs and CMOs each indicated ICD-10 is on the radar for 2015).

This chart gives the percentage of hospital leaders who indicated their facilities will purchase the indicated products in the coming year.

Figure 1: 2015 Purchase Intentions



Purchase Intention By Hospital Size

What hospitals intend to purchase varies depending upon their size. We broke hospitals into 5 groups based upon their size.

- <100 Beds
- 100-250 Beds
- 251-500 Beds
- 501-1000 Beds
- >1000 Beds

Figure 2: Participating Hospitals by Facility Size

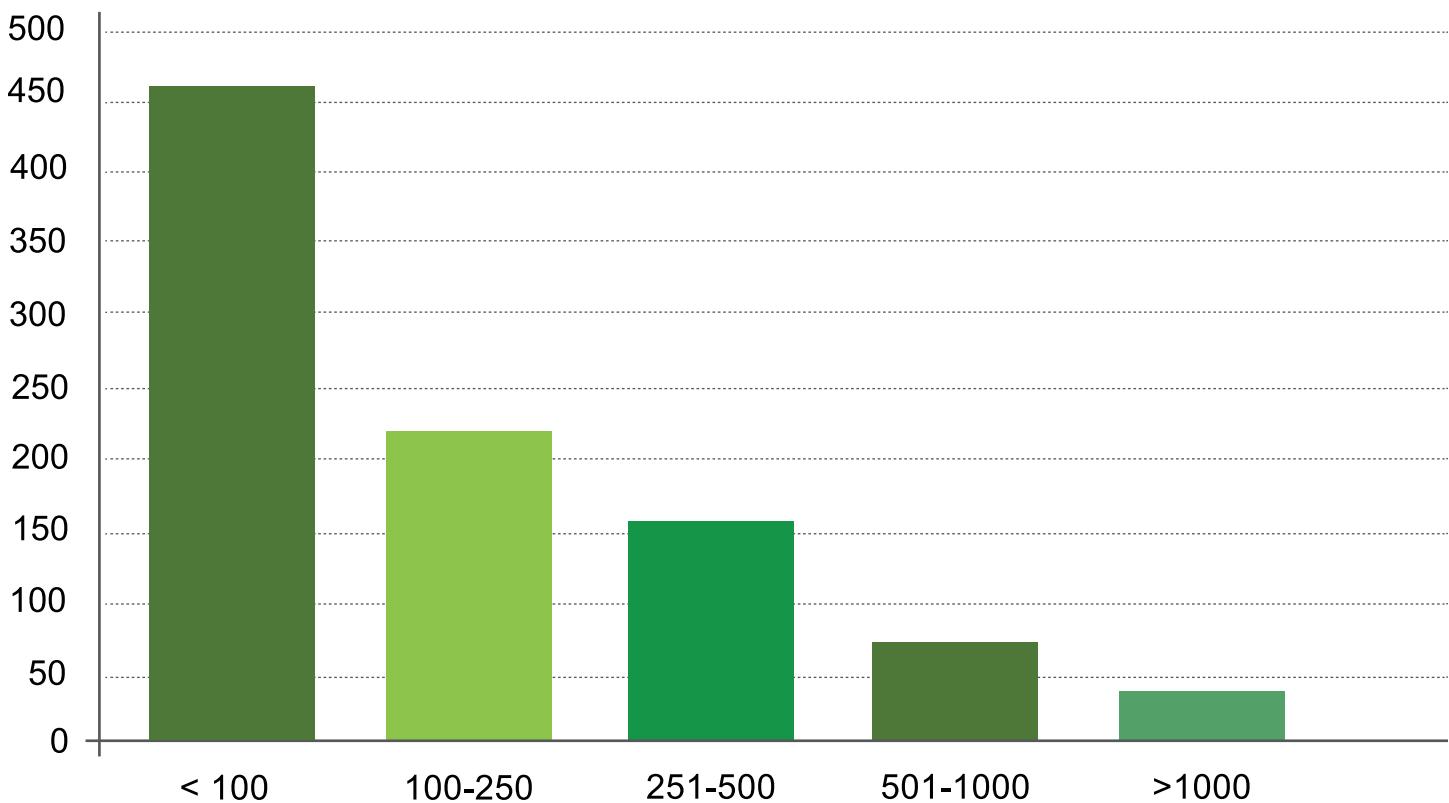
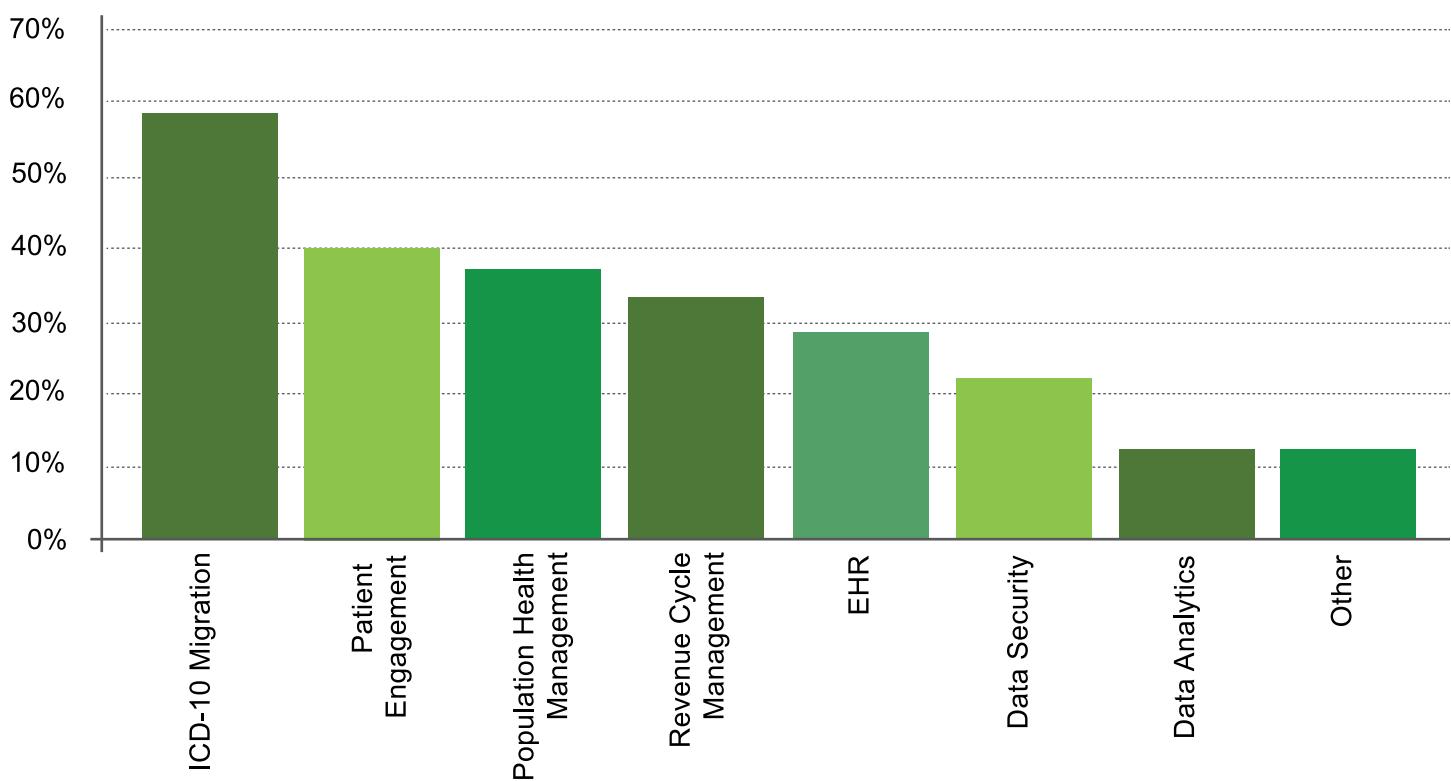


Figure 3: 2015 Purchase Intention < 100 Beds

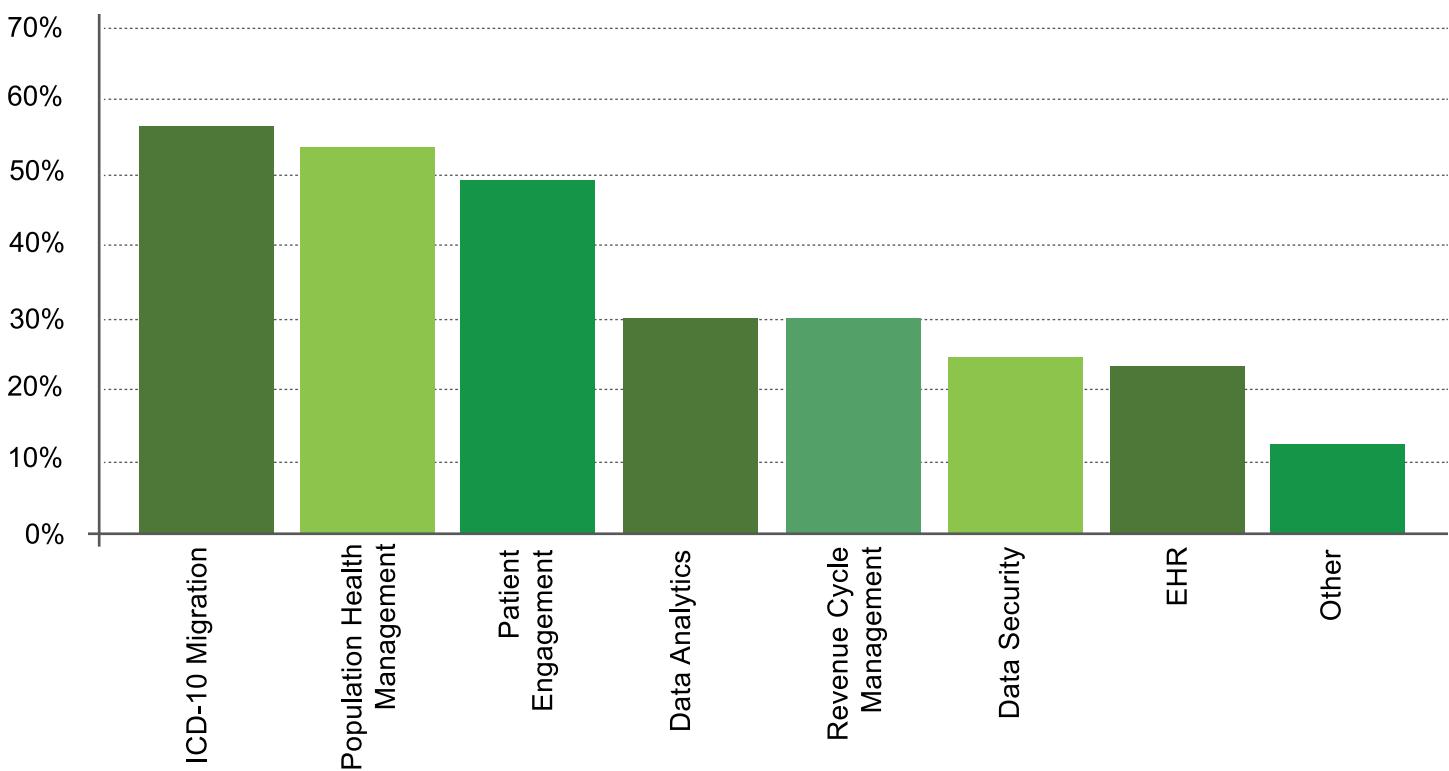


In reviewing this data, it's very apparent that the bigger the organization the more money and resources it has to spend. In general, the likelihood of making a purchase in 2015 goes up with the bed count. This is true for virtually every product. These findings are inherently intuitive.

Very small hospitals with less than 100 beds are going to be very judicious in their respective spending this year. This was particularly true of Data Analytics, which typically requires a level of in-house savvy and resources that most small organizations simply don't have.

However, very small hospitals were more likely to make an EHR purchase than other any other hospital segment under the 500 bed range.

Figure 4: 2015 Purchase Intention 100-250 Beds



Slightly larger hospitals (100-250 beds) reflect many of the current trends in the industry. The vast majority of them already have their go-forward EHR and core financial systems in place and as such are focusing on solutions that can move them towards more cost-effective and responsive patient care (analytics, engaging patients, coordinating care, etc.).

Mid-sized community hospitals were the least likely of any group to be purchasing an EHR this year. There is also going to be a flurry of buying activity surrounding managing, coordinating, and engaging patient populations.

Large stand-alone community hospitals and small IDNs will be buying a lot of products this year. The relatively high rate of EHR-focused purchasing activity may explain the lower-than-expected rate of patient engagement. Perhaps it's simply a case of walking before running.

Figure 5: 2015 Purchase Intention 251-500 Beds

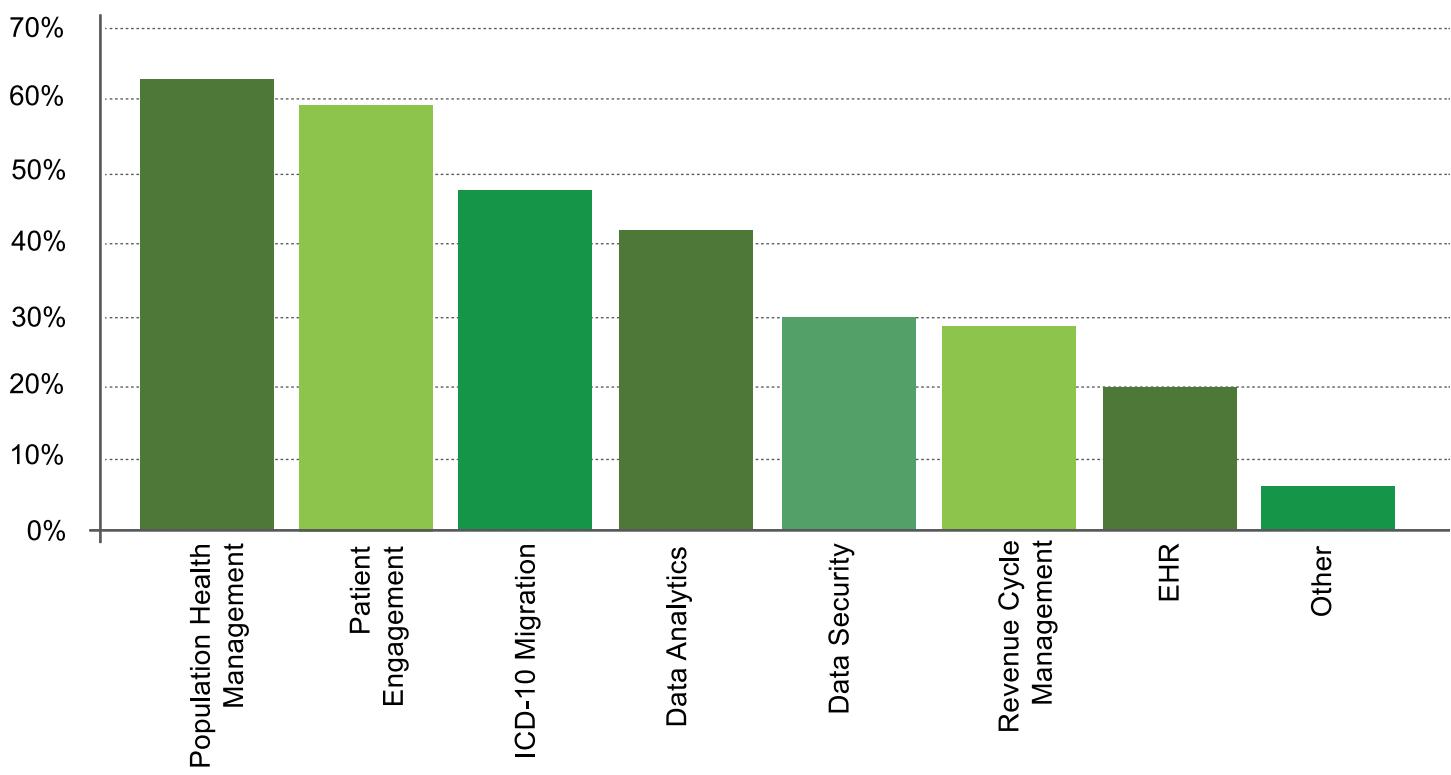
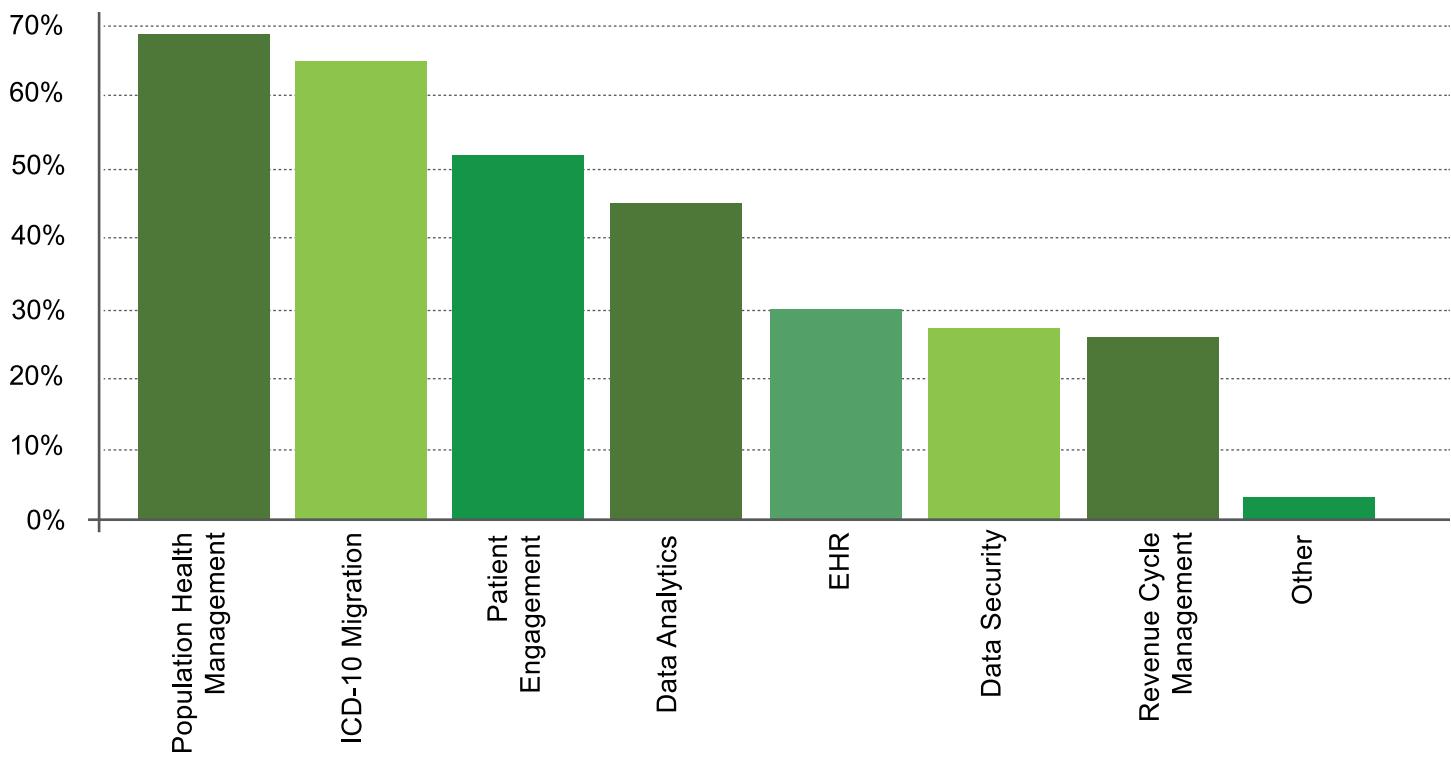
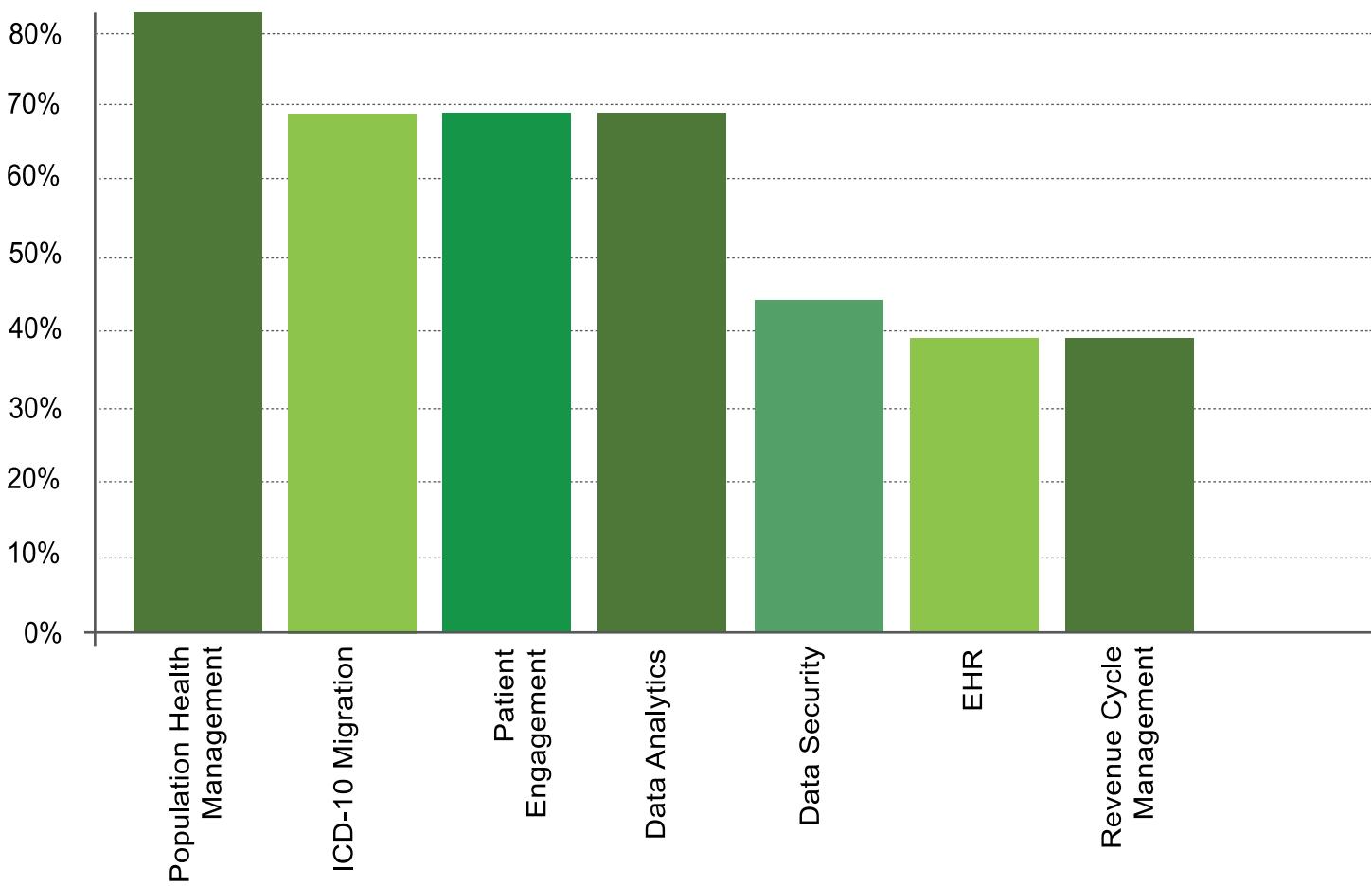


Figure 6: 2015 Purchase Intention 501-1000 Beds



The high-end of the market is also the one with the largest needs, and appetites, for next generation healthcare solutions. The largest facilities were more likely to make purchases than any other hospital segment of the market. Every single facility over 1000 beds said it would purchase at least one major enterprise solution in 2015.

Figure 7: 2015 Purchase Intention > 1000 Beds



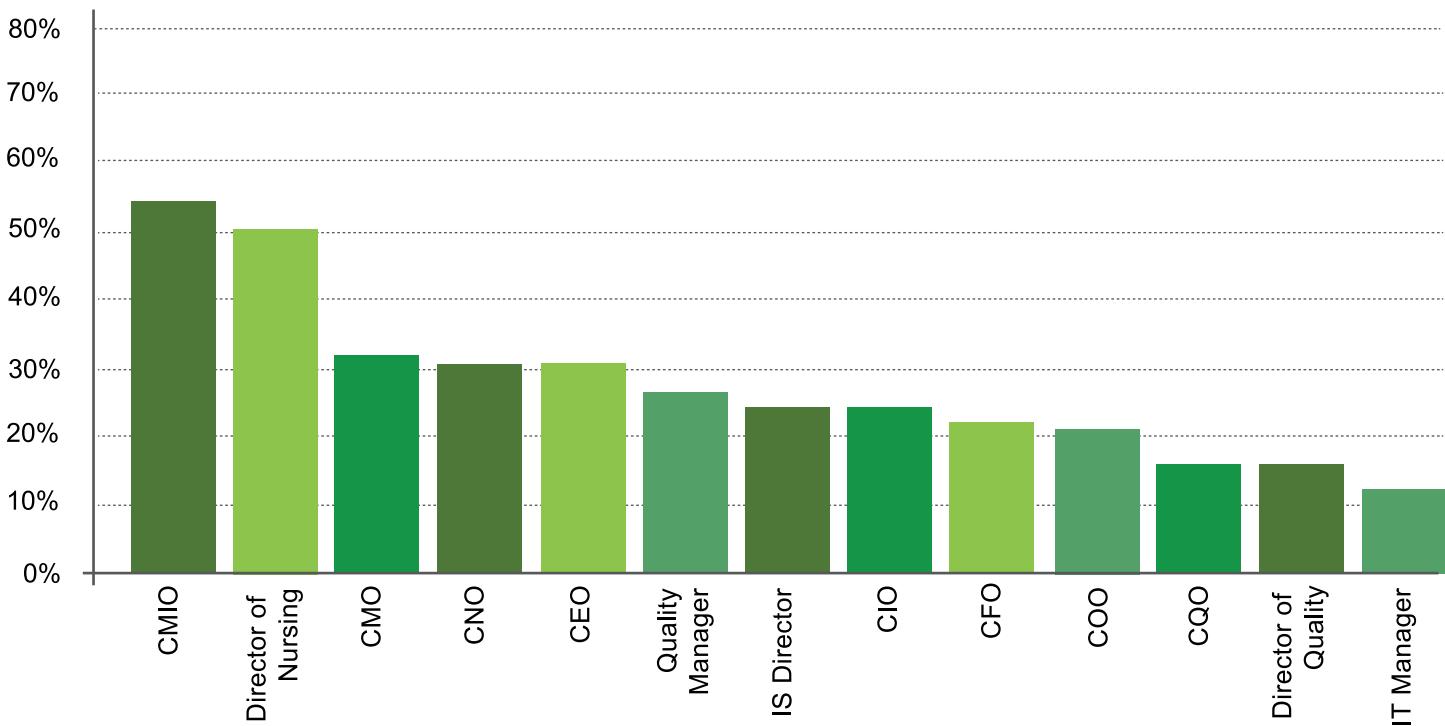
EHR

Electronic Health Record systems are pretty ubiquitous throughout the market, but that doesn't mean sales aren't possible. In fact, over 26% of US hospitals are replacing existing solutions or are adding an additional one in ambulatory settings.

With more than 50% of CMIOs talking about purchasing a new EHR in 2015, there will be plenty of sales opportunities for EHR vendors.

Here are the purchase intentions by title:

Figure 8: EHR Purchase Intention by Role



EHR Market Share

The EHR market includes some very powerful members but there isn't a dominant force that controls all aspects of the hospital market. That is mostly because different vendors appeal to different sizes of facilities.

There are very strong themes among specific hospital sizes, though:

- Among the smallest facilities, CPSI and eClinicalWorks are the market leaders
- MEDITECH, McKesson and Siemens each lead in mid-range hospital categories
- Epic and Cerner dominate among the largest facilities

Figure 9: EHR Market Share

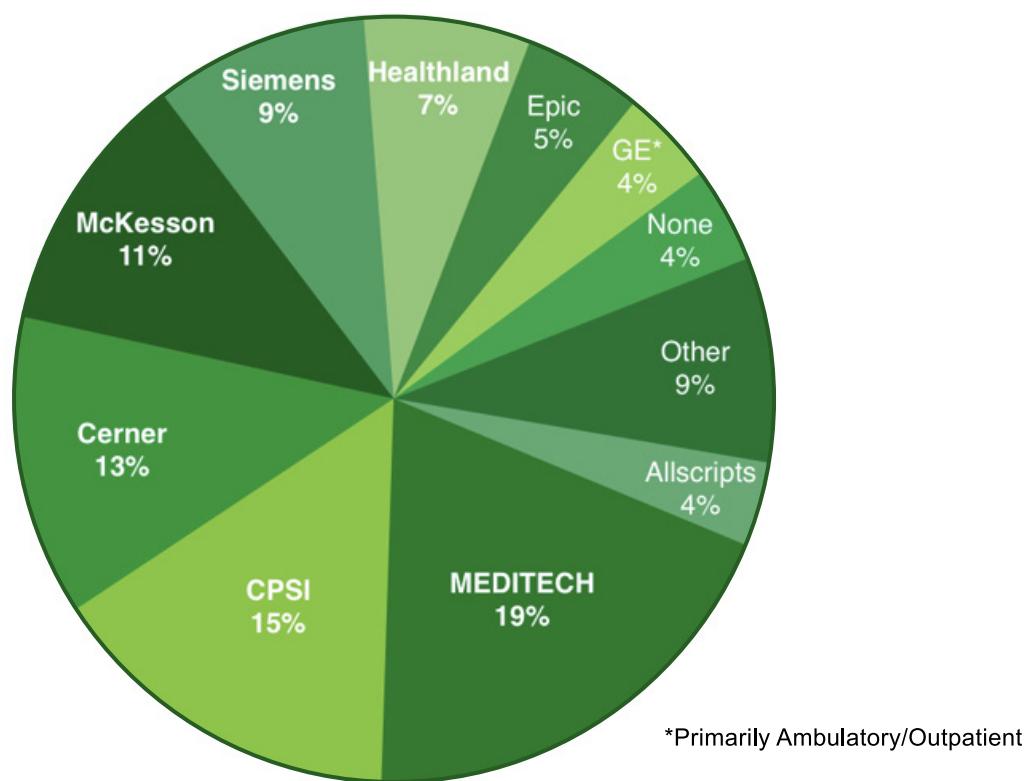


Figure 10: EHR Market Share < 100 Beds

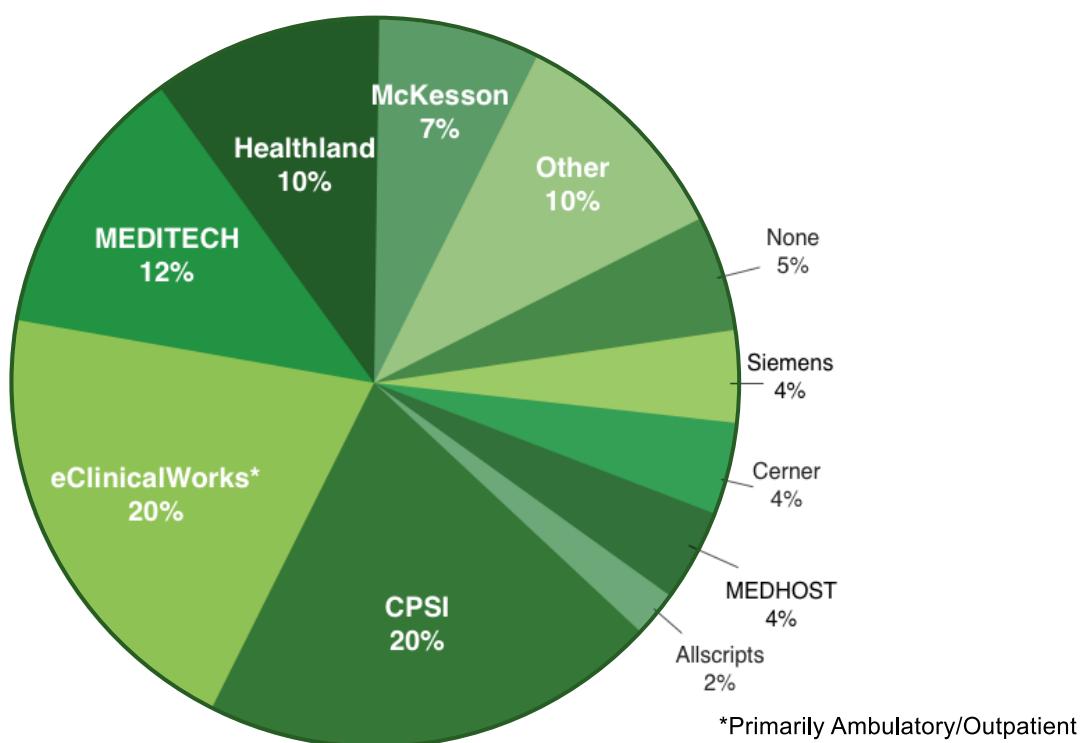


Figure 11: EHR Market Share 100-250 Beds

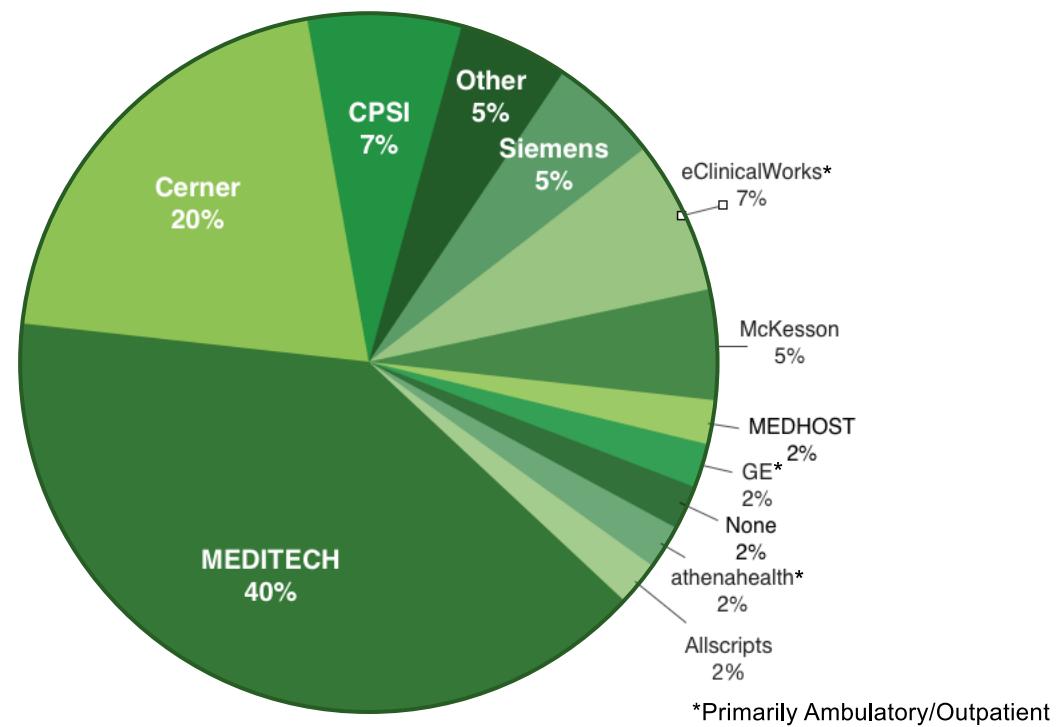


Figure 12: EHR Market Share 251-500 Beds

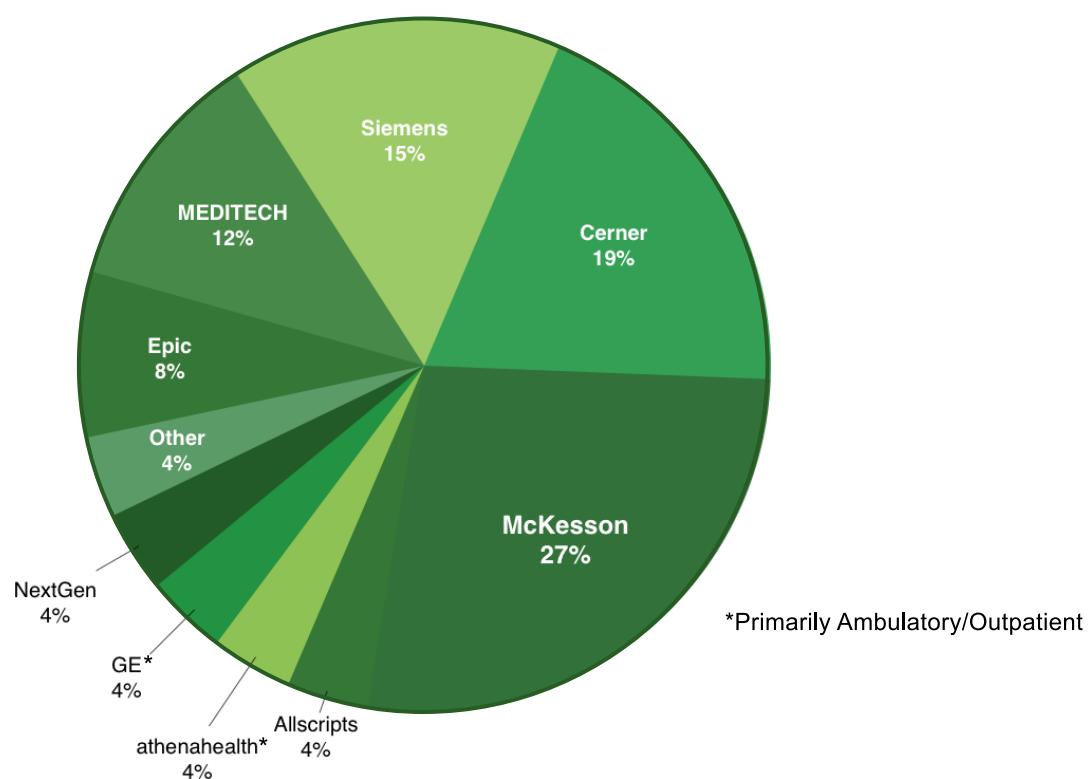


Figure 13: EHR Market Share 501-1000 Beds

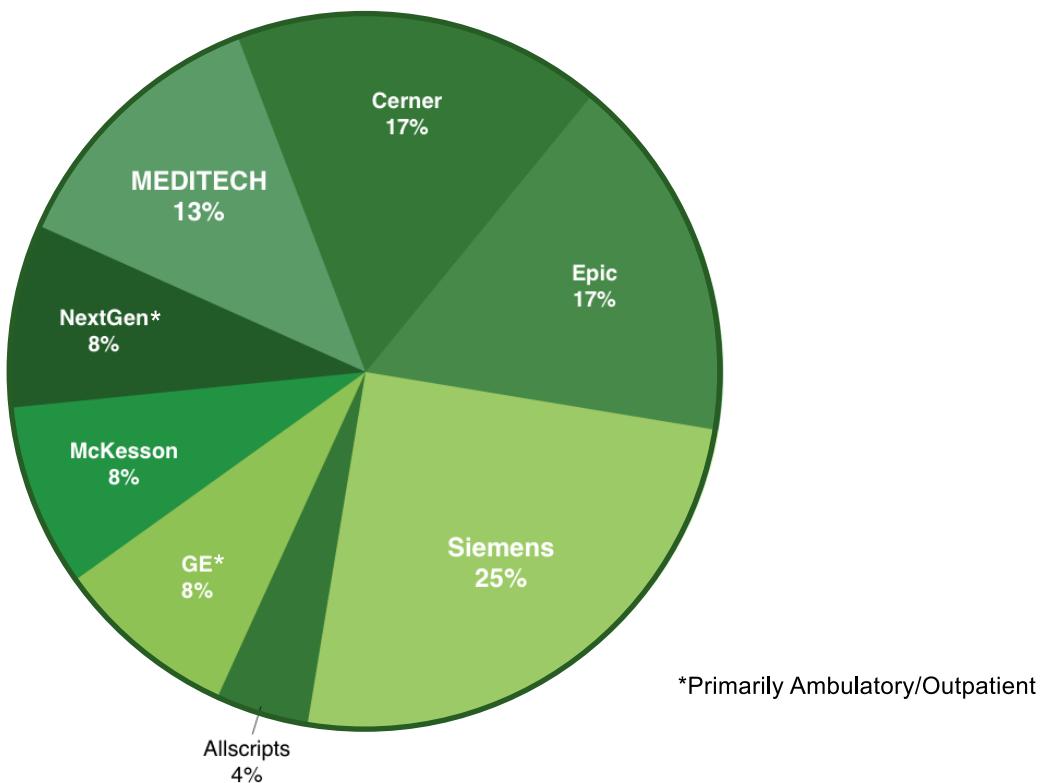
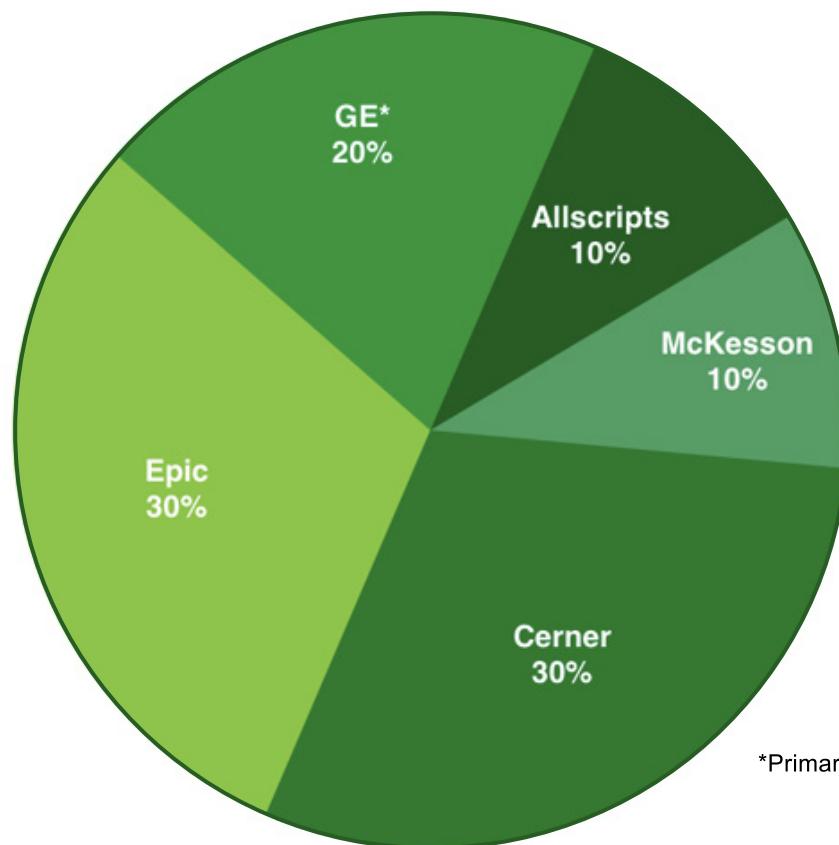


Figure 14: EHR Market Share > 1000 Beds



*Primarily Ambulatory/Outpatient



GE Healthcare

GE Healthcare

GE Healthcare is known primarily for its substantial presence in all things related to medical imaging, but its outpatient EHR solution has substantial market share in large healthcare systems with more than 1000 beds. GE's other healthcare IT solutions also show up throughout this report in various places.



GE's Take

Transforming information into actionable insights to help drive better outcomes

GE Healthcare Integrated Care Solutions help drive better outcomes by accelerating workflows, streamlining processes, and improving analytics capabilities. Centricity™ Solutions can help simplify decision-making across the enterprise by delivering actionable information from population health, care delivery, enterprise imaging, and financial management platforms. All are designed to unlock the predictive value embedded in large data sets and apply it to make more informed decisions where it matters most – by the physician and support organizations at the point of care.

From EMR for ambulatory care to advanced workflow solutions for specialty care areas, GE Healthcare offers solutions tailored for healthcare provider's unique needs—and that help deliver quality outcomes and enhance productivity by streamlining primary and specialty care workflows, including clinical documentation, quality reporting, analytics and surveillance.

Population Health Management solutions include data control, healthcare analytics, care coordination and management, and wellness and patient management. And through GE Healthcare's new partnership with Caradigm™, they are helping to drive successful outcomes for customers, in particular through Caradigm's partnership with a major health plan. These solutions are addressing the customer's needs by enabling transparency through

‘one patient, one record’ – providing access to patient information across 19 different applications and databases to providers. Because a patient’s condition can evolve rapidly, built-in analytics were needed to provide updates in near-real time.

Health system operating margins are under significant pressure. Revenues are flat. Medicare reimbursement is declining. Expenses and waste continue to rise. As the risk of financial viability pushes the business of healthcare to its limits; pressure is increasing to provide patients with greater transparency and a more personalized experience. Centricity Solutions for Financial Management are reform ready, right now. Whether in the hospital setting, the ambulatory setting, or both, GE Healthcare can help your organization deliver solid patient outcomes in the face of change, access relevant data to manage margins and drive profitability, connect data across the enterprise for greater insights into patient populations, and take on more risk without compromise.

Look to GE Healthcare for innovative ways of thinking that blend clinical workflow and domain expertise, software and analytics, a strong partner ecosystem – and most importantly, knowledgeable people – to help move more strategically along the path from treating illness to managing health.

Robust solutions supported by enterprise-class professional services

GE Healthcare Integrated Care Solutions include access to a team of consultants and a portfolio of services that help achieve optimum system performance and staff productivity.

At the start of customer engagements, the GE Healthcare team of consultants can help assess imaging needs and review current state workflows. Consultants will help design an optimal workflow to meet unique organizational requirements. Education consultants then help drive change across the enterprise and enhance utilization. GE Healthcare support services help maintain system performance through ongoing assessments, 24/7 technical support, and remote monitoring – which has helped some customers reduce the cost of outages by an average of ~\$250K per year.

EHR Mindshare

Future sales of EHRs seem to be congregating around three companies: Cerner, Epic and MEDITECH. However, the opportunity for other competitors is better than the aggregate mindshare graph suggests because different vendors compete for very different hospital segments of the market.

- MEDITECH leads mindshare among hospitals with up to 250 beds
- Epic is expanding its influence downstream in the market and leads mindshare from 250-1000 beds
- Cerner leads in mindshare for hospitals with more than 1000 beds
- McKesson is being considered by hospitals in every single market, as is Allscripts (except for exceptionally large health systems)

Figure 15: EHR Mindshare

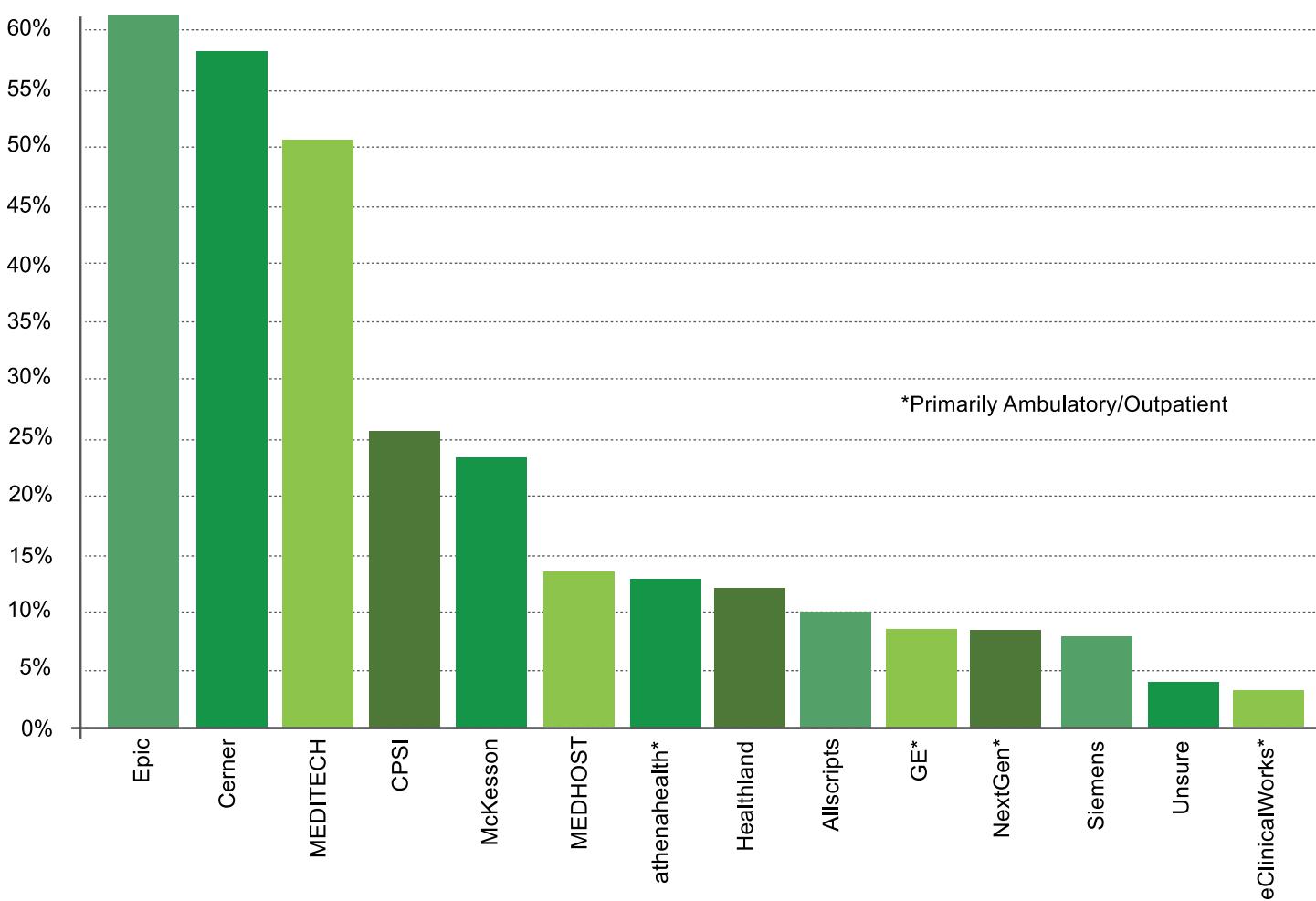


Figure 16: EHR Mindshare < 100 Beds

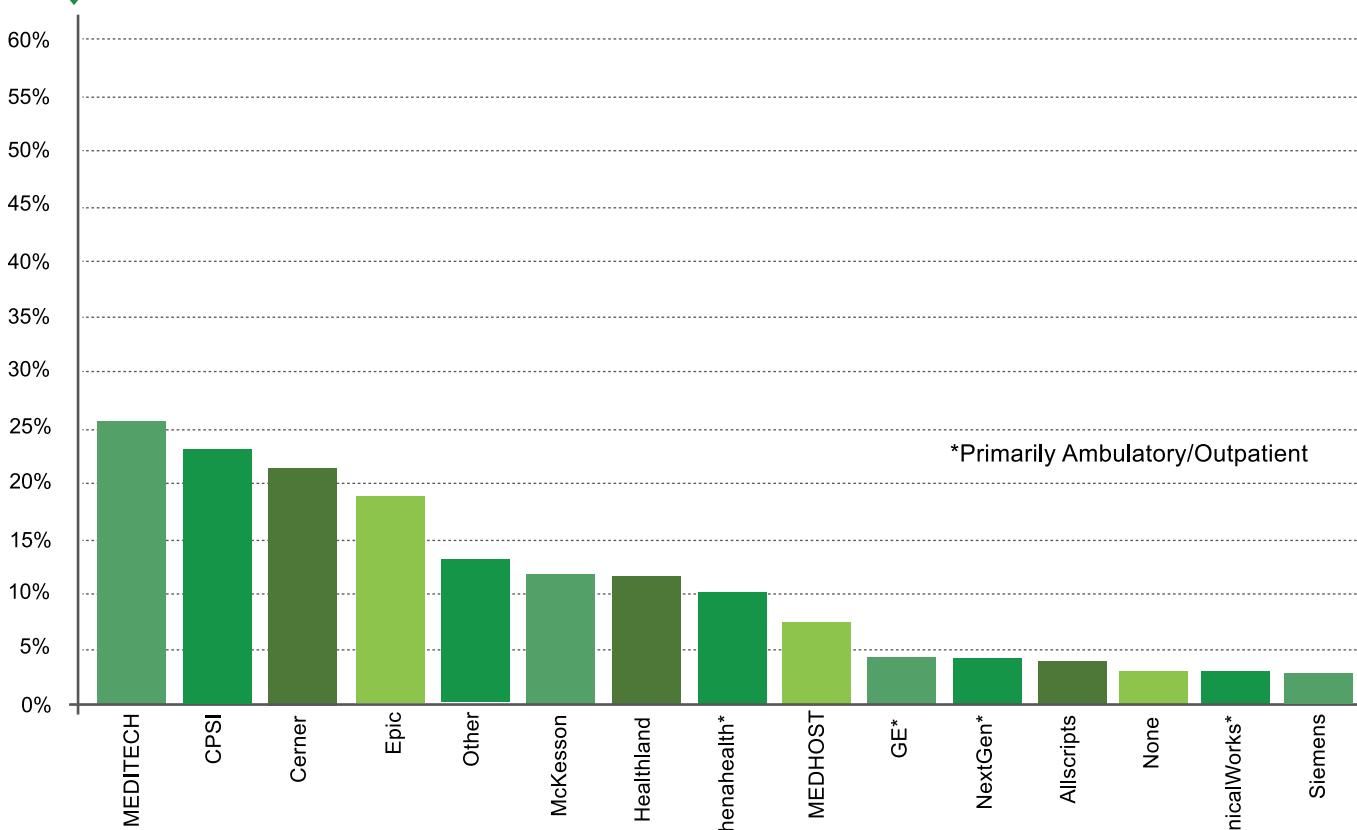


Figure 17: EHR Mindshare 100-250 Beds

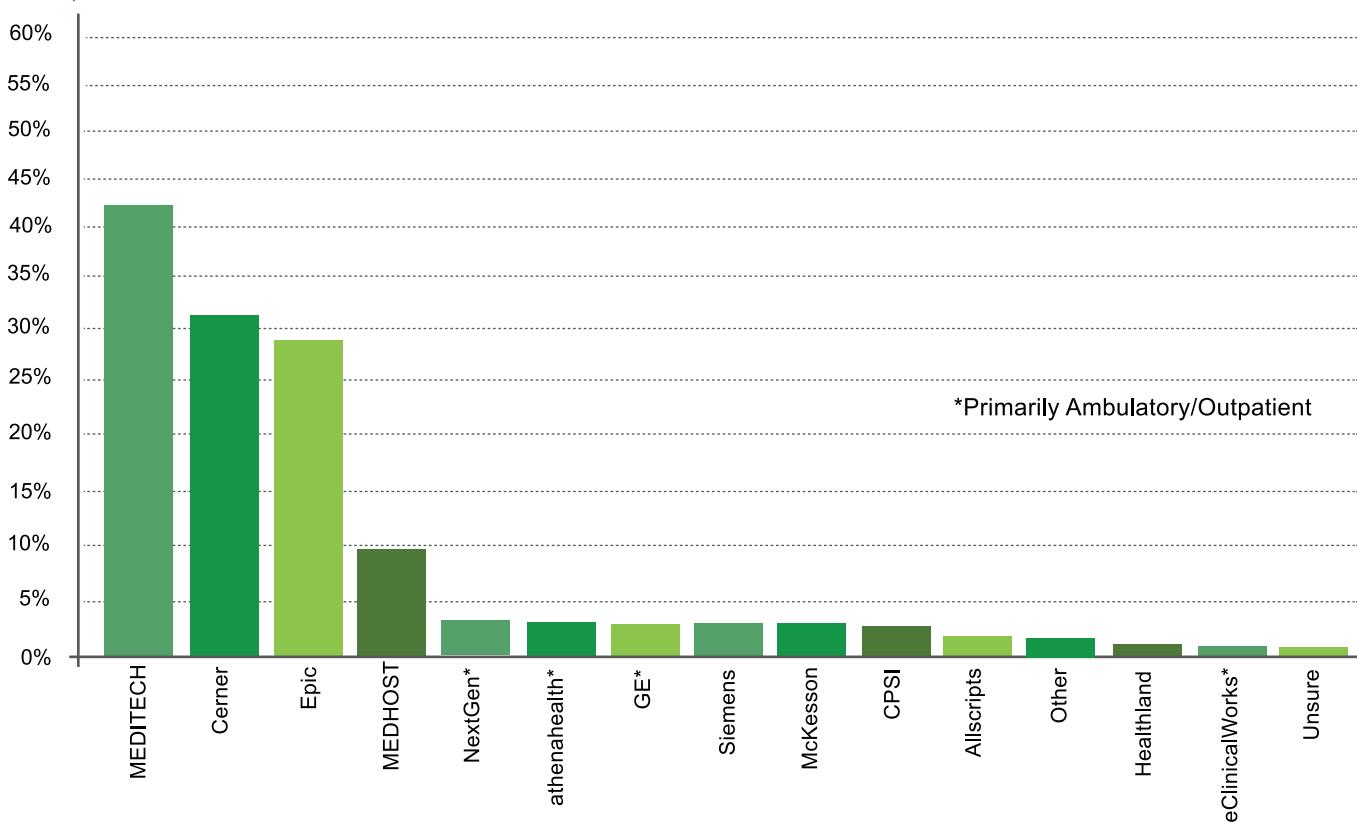


Figure 18: EHR Mindshare 251-500 Beds

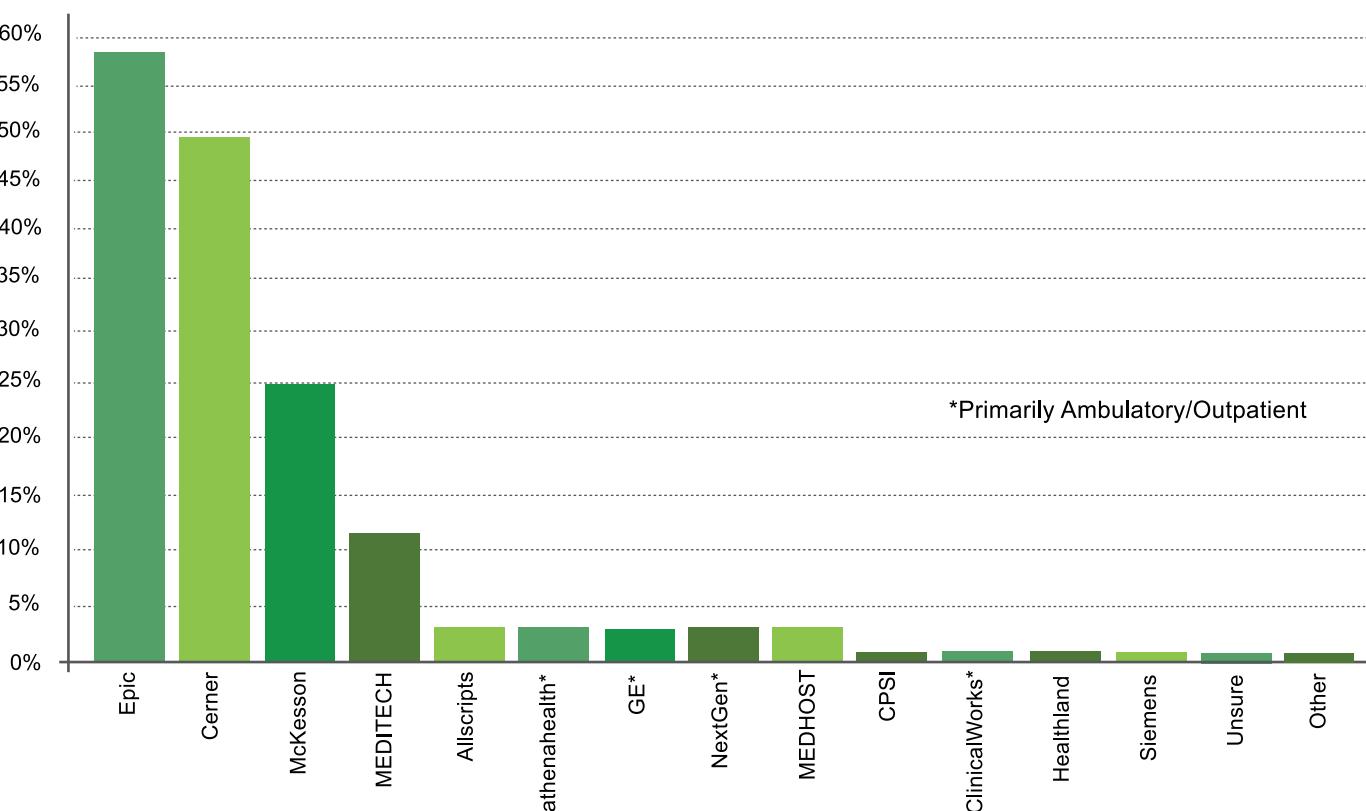


Figure 19: EHR Mindshare 501-1000 Beds

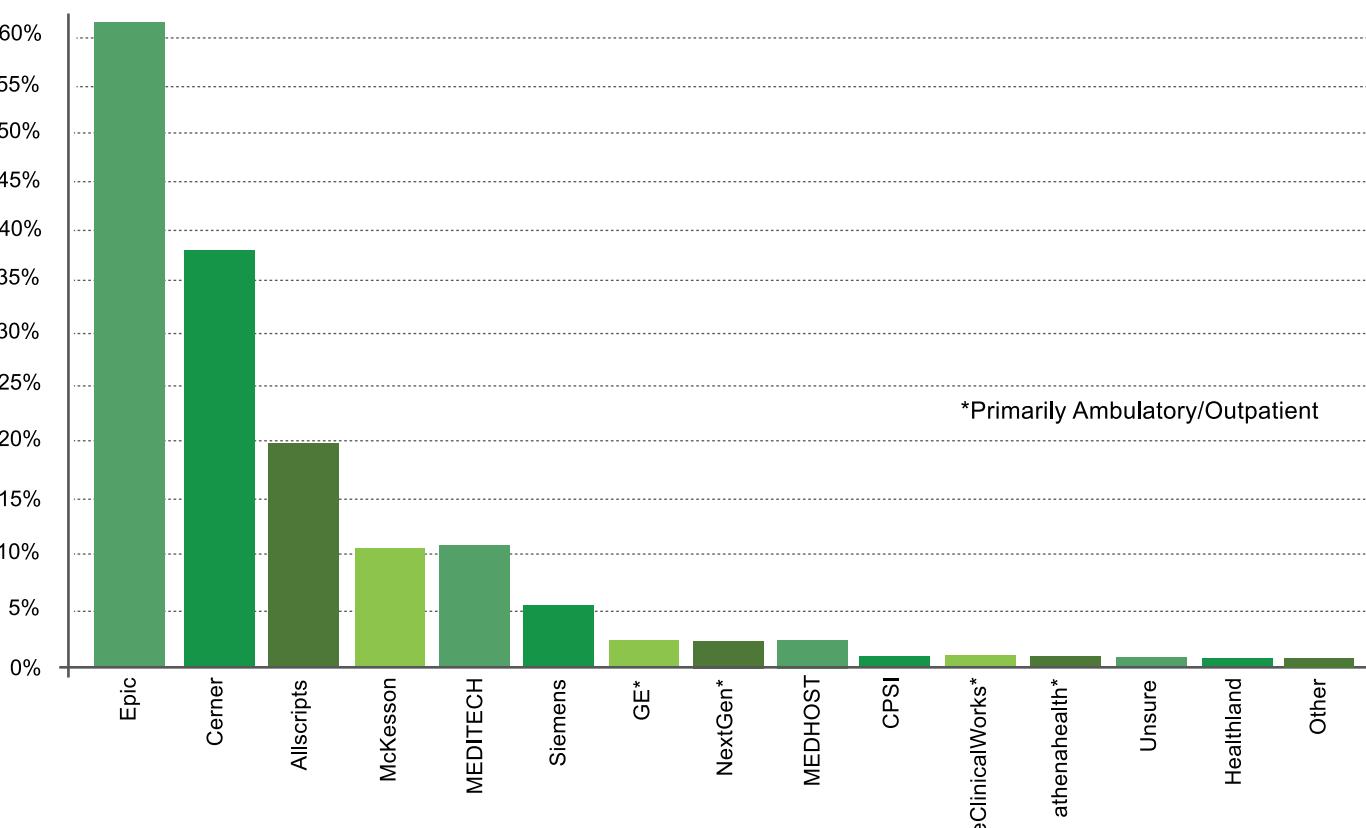
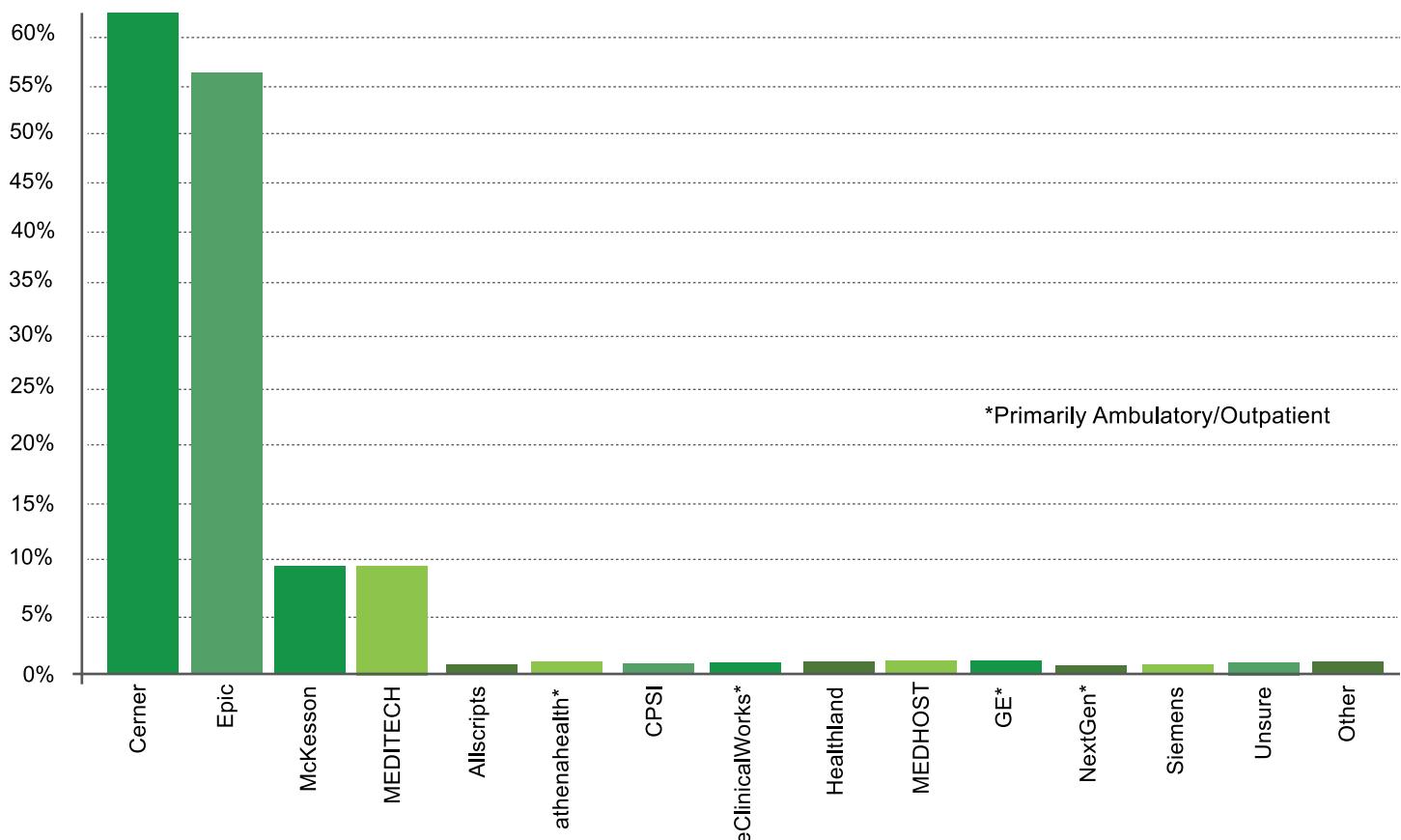


Figure 20: EHR Mindshare > 1000 Beds





Epic

It's no secret that Epic has grown its market share massively over the past decade. It is poised to do so again, obtaining substantial mindshare for its solution throughout this report. Typically, Epic starts to dominate among hospitals that have at least 250 beds. While a few facilities smaller than that will consider Epic, the sweet spot for them certainly seems to be in the 250-1000 bed range.



Epic's Take

Epic makes software for mid-size and large medical groups, hospitals and integrated healthcare organizations – working with customers that include community hospitals, academic facilities, children’s organizations, safety net providers and multi-hospital systems. Our integrated software spans clinical, access, and revenue functions and extends into the home.

Epic’s on-time, on-budget track record is one of the best in healthcare, as rated by independent reviewers. Epic software is quick to implement, easy to use and highly interoperable through industry standards.

Founded in 1979, Epic is private and employee-owned. We develop, install, and support all our applications in-house. Epic’s leadership team includes clinicians, developers, and process experts – people deeply experienced in patient care and healthcare technology.

Headquarters: Verona, WI, USA

Ownership: Private

Website: www.epic.com

Phone: 608) 271-9000

Email: info@epic.com

(infographic — Epics Stats)



MEDHOST

MEDHOST's appeal is centered among smaller facilities, particularly those under 100 beds.

MEDHOST's Take

MEDHOST is a provider of market-leading enterprise, departmental and healthcare engagement solutions. Our healthcare management system includes intuitive, easy-to-use and SaaS-enabled solutions complemented by a robust suite of managed hosting, outsourcing and consulting services that are changing how clinicians and hospital leaders work and communicate, while generating notable operational, patient flow, care and revenue improvements.

MEDHOST is committed to delivering healthcare technology services that enable our Customers to maximize revenue capture, optimize administrative efficiencies and better manage enterprise clinical capabilities.

By working with and gaining insight from our Customers, MEDHOST invests in software development that both reflects current requirements and anticipates needs often times in advance of marketplace demand. Through this visionary approach, we are able to successfully serve and meet the diverse needs of a dynamic provider marketplace, including general acute care critical access and community hospitals, multi-facility health systems, behavioral health providers, post-acute care facilities and specialty surgical centers.

We are singularly focused on listening to our Customers in order to ensure we are developing the right solutions to meet their needs. In fact, our principle goals are center around developing Customer-focused solutions and delivering Customer satisfaction. The art of listening to understand is a core value that has enabled MEDHOST to become one of the largest health solutions companies in the U.S., serving more than 1,000 hospitals nationwide.

This has led to innovative healthcare solutions like YourCareUniverse, an engagement platform connects all stakeholders in a care community, with an emphasis on keeping the patient centered in all healthcare interactions. Through the YourCareUniverse suite of solutions and focused consulting services, MEDHOST has developed tools to allow the patient and provider to more effectively collaborate on achieving optimal levels of health and wellness.

Since simply having an EHR is not enough to succeed in healthcare, MEDHOST created a Physician Advisory Board to drive the development of an intuitive and innovative EHR. With a laser-focus on creating a next-generation solution that improves efficiency and fits seamlessly within the existing clinician workflow, the MEDHOST Physician Experience was born. Again, by listening to physicians, the chart, note and order functions of the Physician Experience deliver workflow optimization based on the natural way physicians work, with a clean, uncluttered interface and a brilliant design. The benefits are many for hospitals and physicians, from accurate documentation,

enhanced patient care and precise reimbursement.

The mission of MEDHOST is to be a leading provider of software solutions and services designed to improve the clinical, financial and operational performance of healthcare providers worldwide. Every day, we take steps toward fulfilling that mission by empowering hospitals of all types and all sizes to better manage care and the business of healthcare.

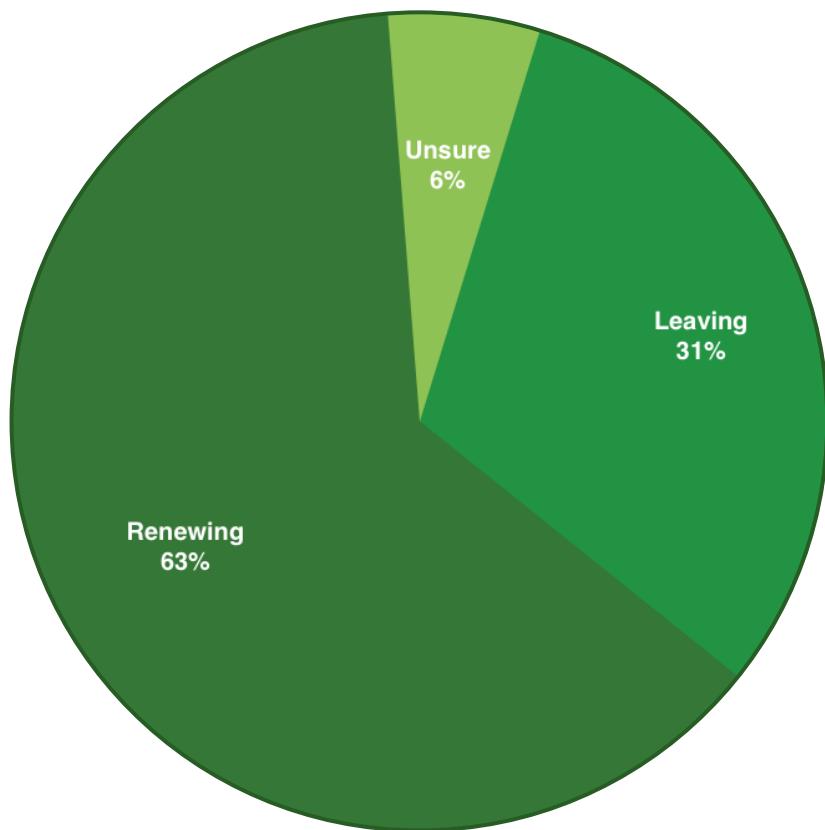
EHR Renewal

Our research indicates that a strong replacement market is developing for EHR products. 27% of hospitals indicated they are looking to replace their current EHR, and, of those, 31% are sure they aren't going back to their current vendor.

That means at least 8% of US Hospitals will replace their current EHR vendor in 2015. In addition, another 1-2% may leave. All told, nearly 10% of the US Hospital market is up for grabs this year.

Note: We do have specific renewal rates for each unique vendor, but they won't be provided in this report. peer60 would be happy to provide each vendor's renewal rate. Please contact Jeremy Bikman, jbikman@peer60.com, and he can provide that information in a phone call.

Figure 21: EHR Renewal



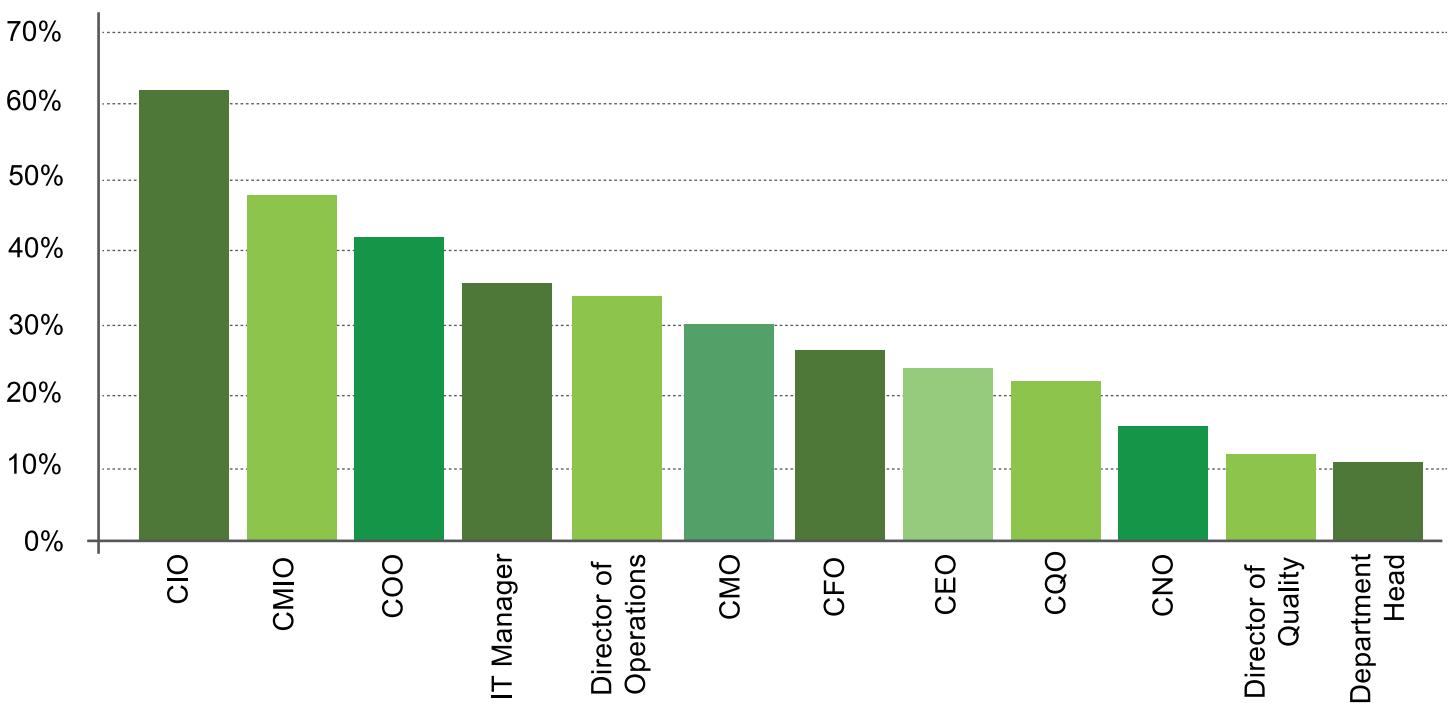
Data Analytics

Once a hospital has its go-forward EHR solution in place, a hospital is far from being done. An EHR truly is just the first step and analyzing the massive amount of patient, financial, and operational data is critical for a hospital to take the next step in its evolution. That being the case, more than 26% of hospital leaders said they were planning to purchase an enterprise analytics suite or at least one analytics tool in 2015 – 30% of these purchases were first-time rather than replacements so this space is still very much in its infancy, relatively speaking. It is clear that the Data Analytics space is very fragmented and still fairly new.

CIO's are the hospital leaders most dialed into the promise Data Analytics solutions will bring to healthcare, although other positions are interested as well.

Over 60% of CIOs said their organization is planning to make some sort of purchase in the Data Analytics space during 2015. The market for either an entire suite or simply a tool that can do some analysis is very large.

Figure 22: Data Analytics Purchase Intention by Role



Data Analytics Market Share

As you can see, McKesson is the market share leader in this space, controlling market share among every hospital size group:

- Numerous hospitals are looking to purchase a Data Analytics tool for the first time in 2015
- Smaller facilities are less likely to have a Data Analytics tool
- Despite McKesson's consistent lead as the most-used tool in the space, there are numerous other products with small chunks of market share

Figure 23: Data Analytics Market Share

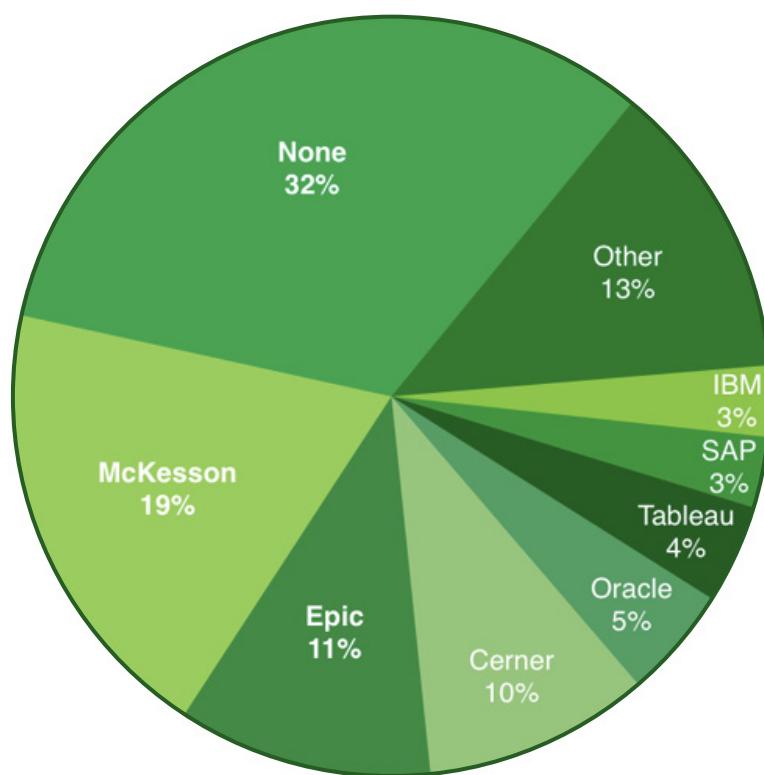


Figure 24: Data Analytics Market Share < 100 Beds

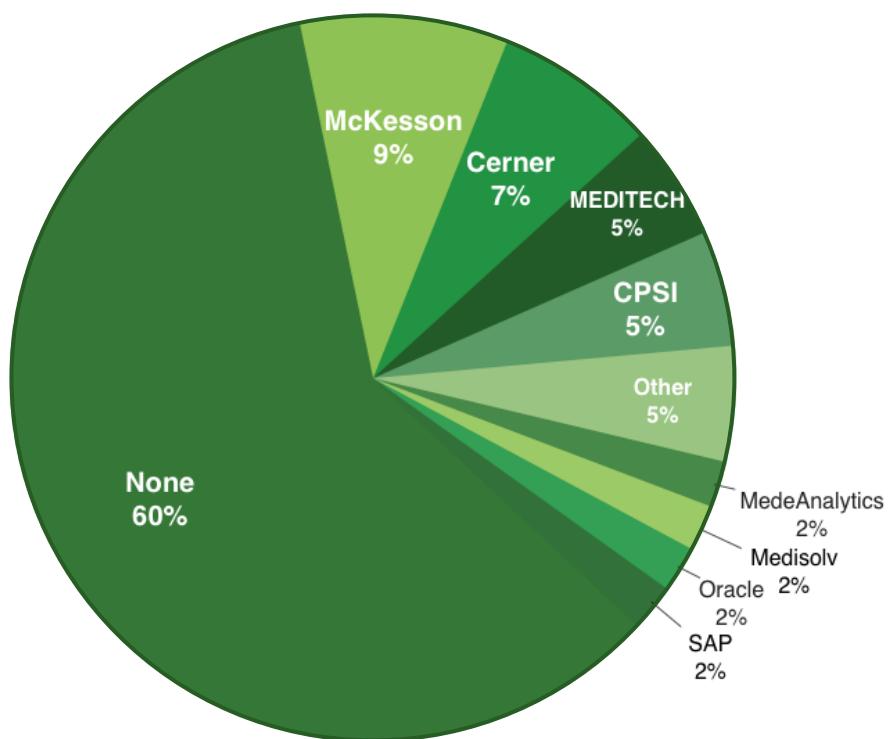


Figure 25: Data Analytics Market Share 100-250 Beds

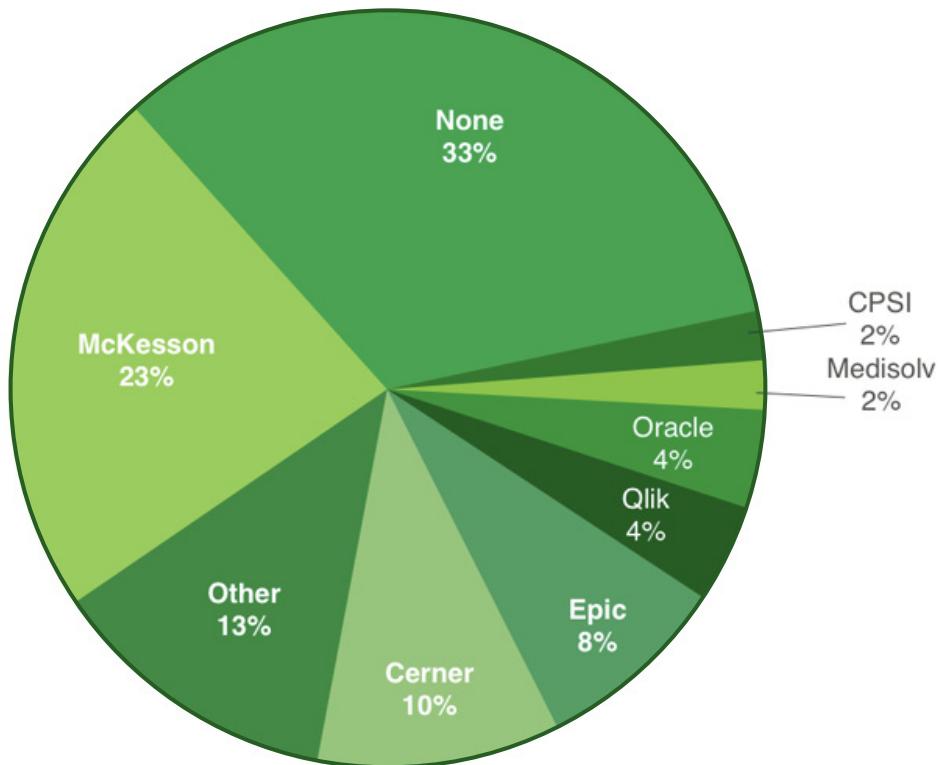


Figure 26: Data Analytics Market Share 251-500 Beds

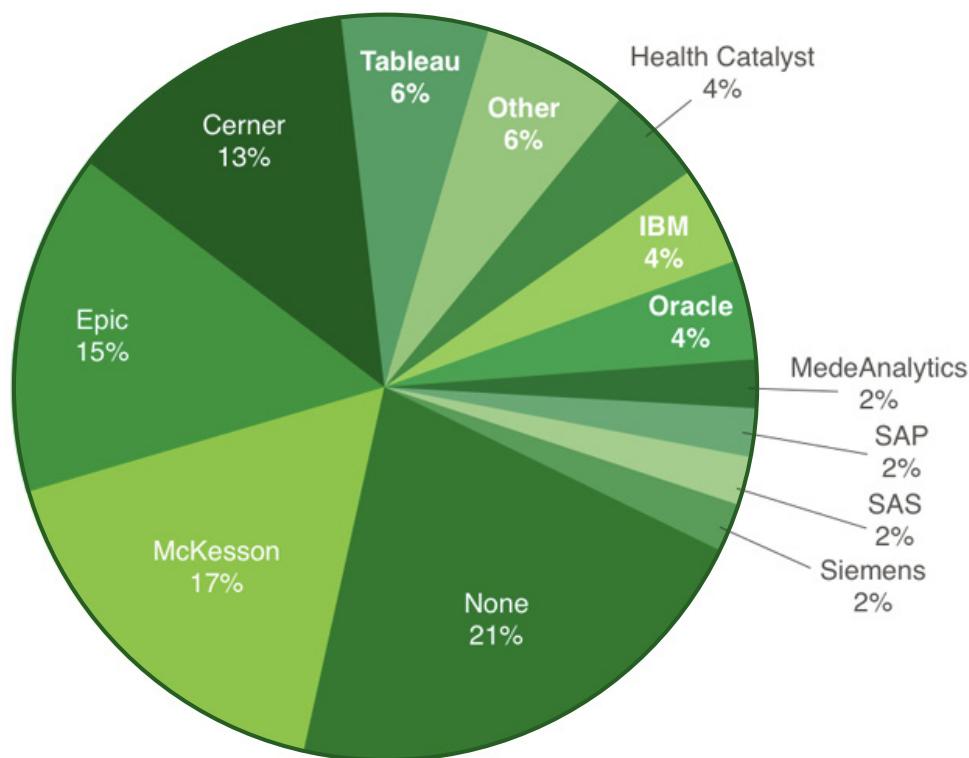


Figure 27: Data Analytics Market Share 501-1000 Beds

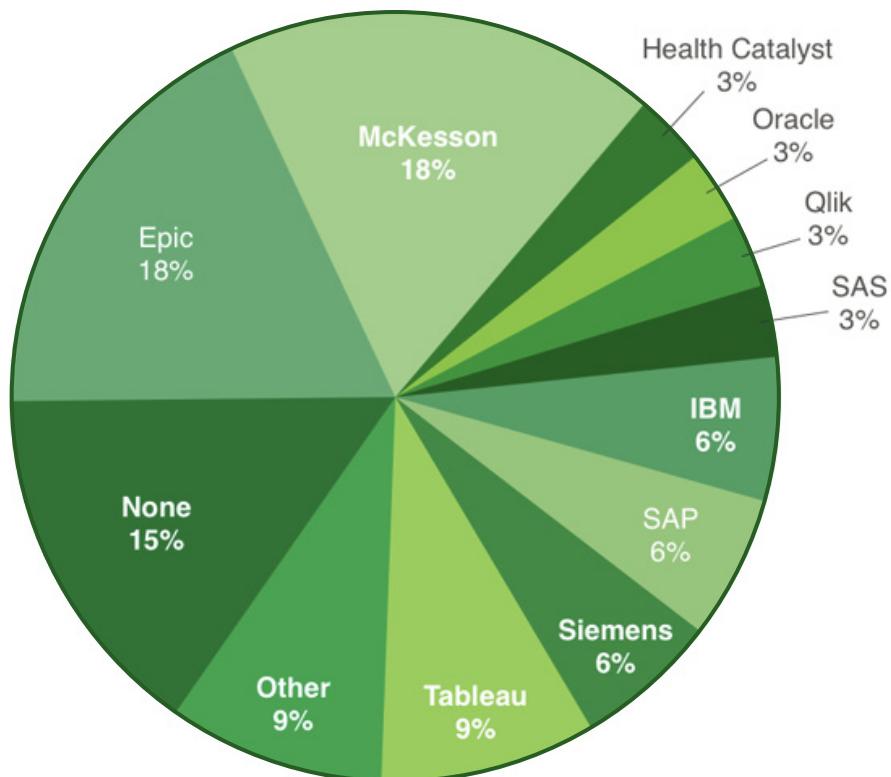
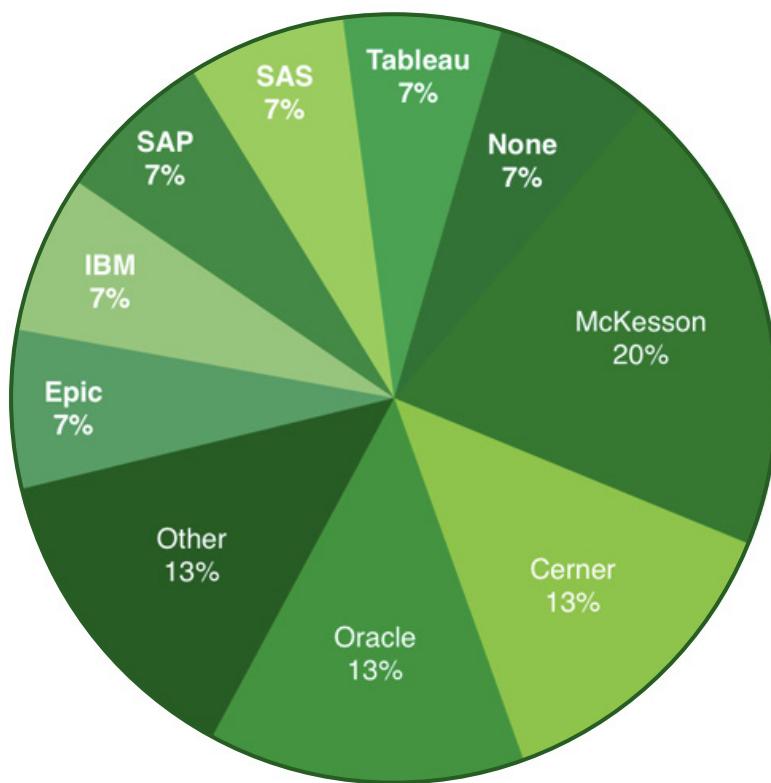


Figure 28: Data Analytics Market Share > 1000 Beds



MCKESSON

McKesson

McKesson leads market share in the Data Analytics space, but its most impressive achievement might be appealing to virtually every size of hospital in a wide range of products. There are very few graphs in this report where McKesson does not receive at least a couple percent.

This poses a huge opportunity for McKesson as the company has the ability to compete in many, many spaces.



McKesson's Take

McKesson Technology Solutions (MTS) is part of McKesson Corporation, a Fortune 15 company dedicated to the business of better health. With the industry's most diverse portfolio of software, services and consulting expertise, MTS serves a broad spectrum of healthcare, ranging from hospitals and large integrated health systems to physicians, home health, imaging centers, retail pharmacies, payers and health plans. Our aim and passion is to help our customers chart a clear, focused and achievable path that leads to better health for their businesses and the communities they serve.

MTS offers a wide range of technology solutions and services, with No. 1 positions in areas as diverse as health plan payment management, enterprise intelligence and physician revenue cycle outsourcing, to name a few. Examples of our extensive market experience include:

- 80,000+ physicians use MTS revenue cycle and practice management services or electronic health record products
- 2,000+ hospitals and health systems use the RelayHealth Financial connectivity network to process more than 5 million patient claims, worth \$1.1+ trillion annually
- 14+ billion prescription transactions are managed by RelayHealth Pharmacy each year, which services 50,000+ retail pharmacies
- InterQual® is used by over 72% of hospitals, and all of the top 10 health plans in the United States use one or more McKesson solutions

The 360° perspective we've gained by working with customers across healthcare means we can help you make real progress today and plan for the future as the shift continues toward value-based care. Through our Better Health 2020™ strategy, we can help you tackle what's ahead in key areas such as financial management, quality and performance improvement, connectivity and risk assumption as you transition toward value-based care and reimbursement. So whether you're just getting started or have advanced capabilities, we work as your strategic partner providing focused, attainable steps to fuel long-term success and help your business thrive.

Data Analytics Mindshare

This area appears poised to consolidate significantly in 2015. Epic, Cerner and McKesson have the most mind-share from hospital leaders in this study, however, their respective strengths are at different hospital sizes:

- Cerner appears to have significant mindshare among facilities with fewer than 100 beds
- McKesson is poised to remain the market leader in hospitals with 100-250 beds
- Epic, Cerner and McKesson are poised to gain significant market share among hospitals with 251-500 beds
- Epic takes the lead among hospitals with more than 251 beds

Figure 29: Data Analytics Mindshare

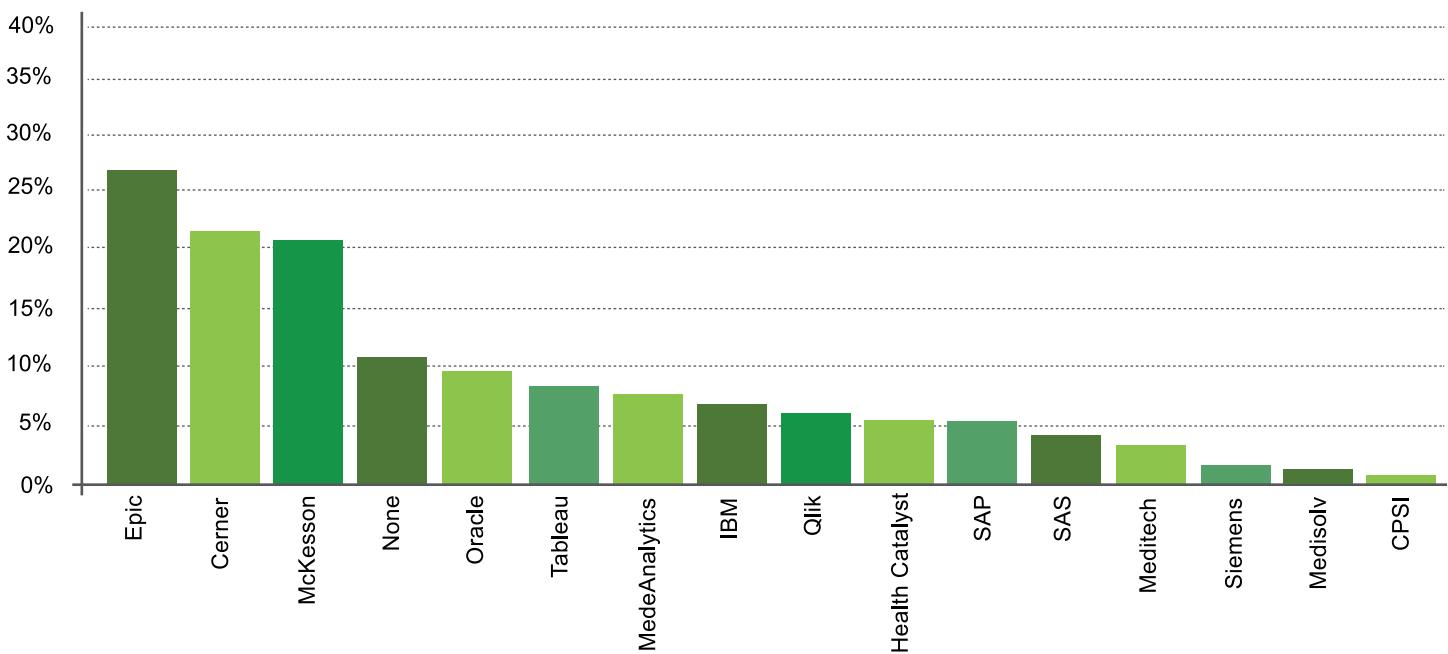


Figure 30: Data Analytics Mindshare < 100 Beds

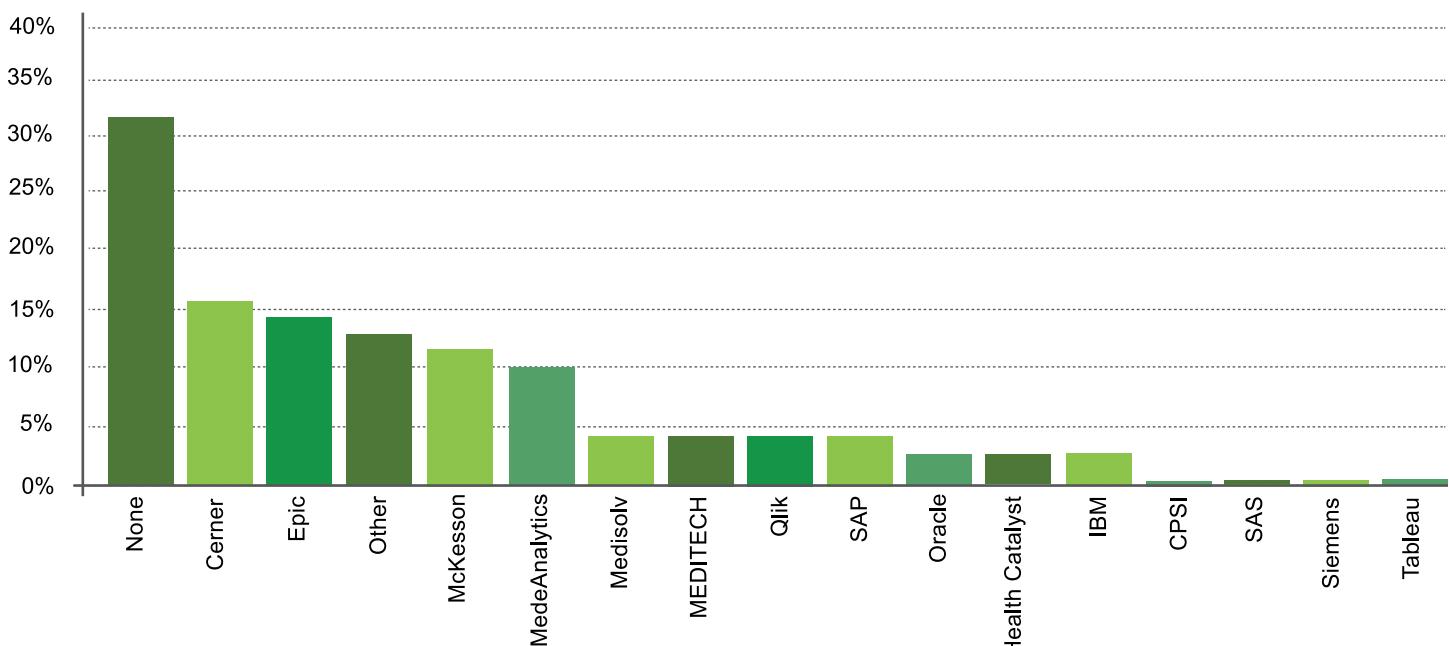


Figure 31: Data Analytics Mindshare 100-250 Beds

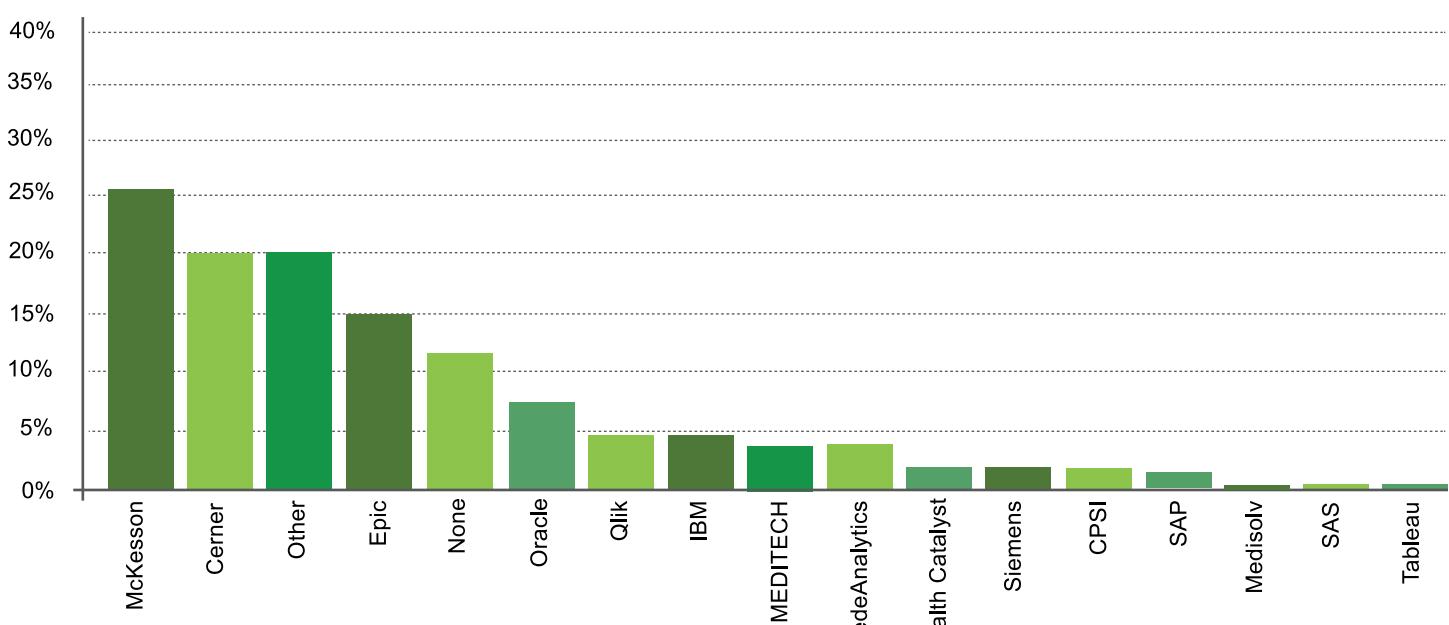


Figure 32: Data Analytics Mindshare 251-500 Beds

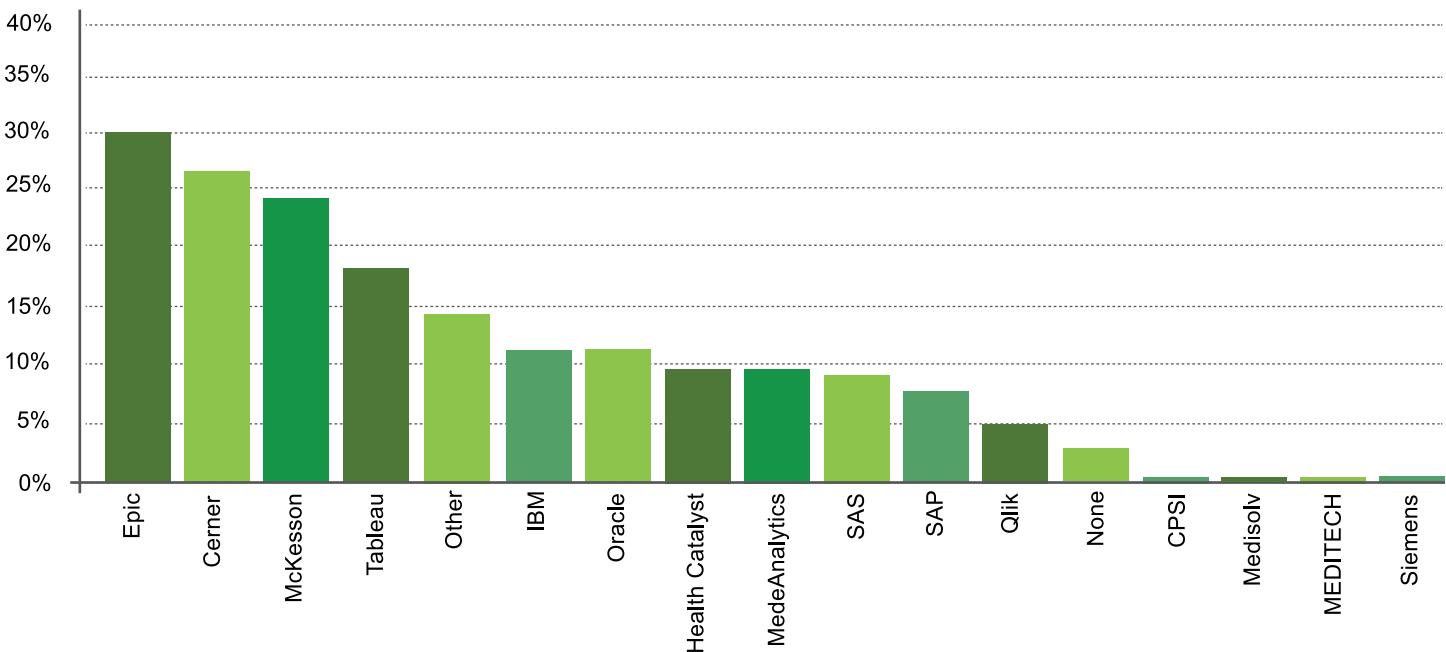


Figure 33: Data Analytics Mindshare 501-1000 Beds

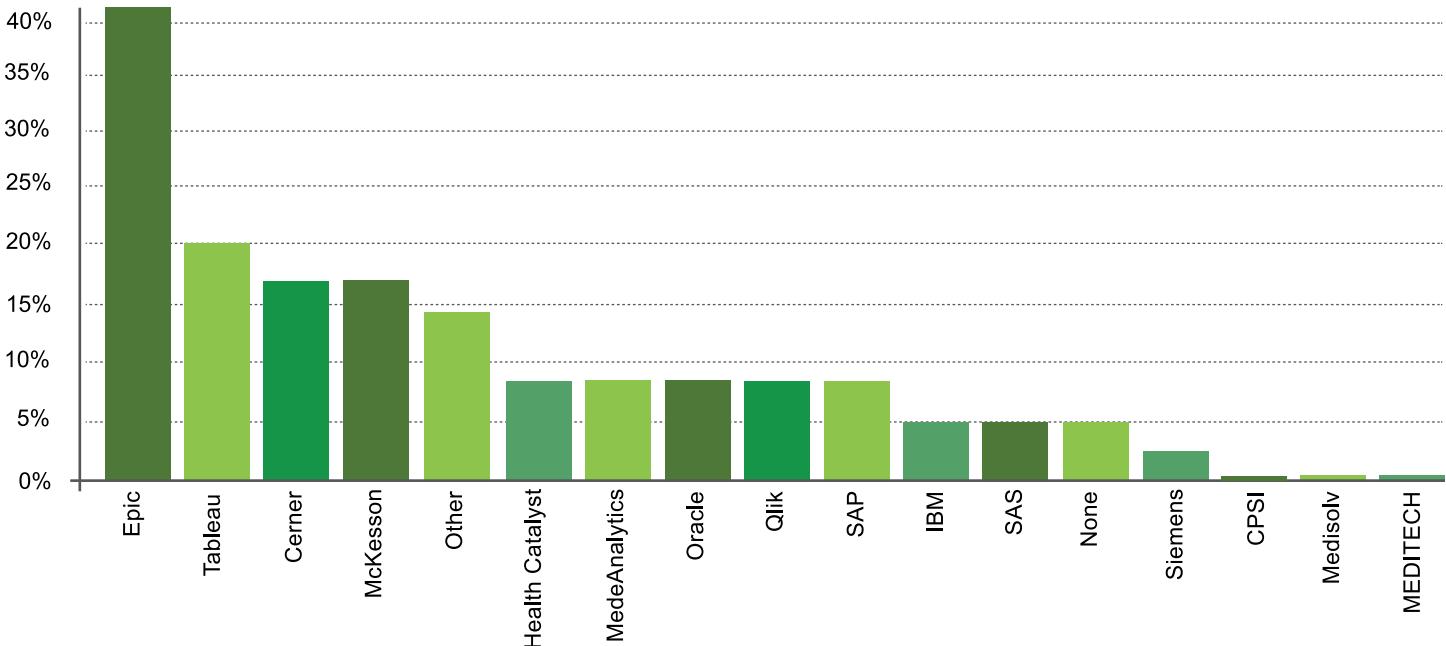
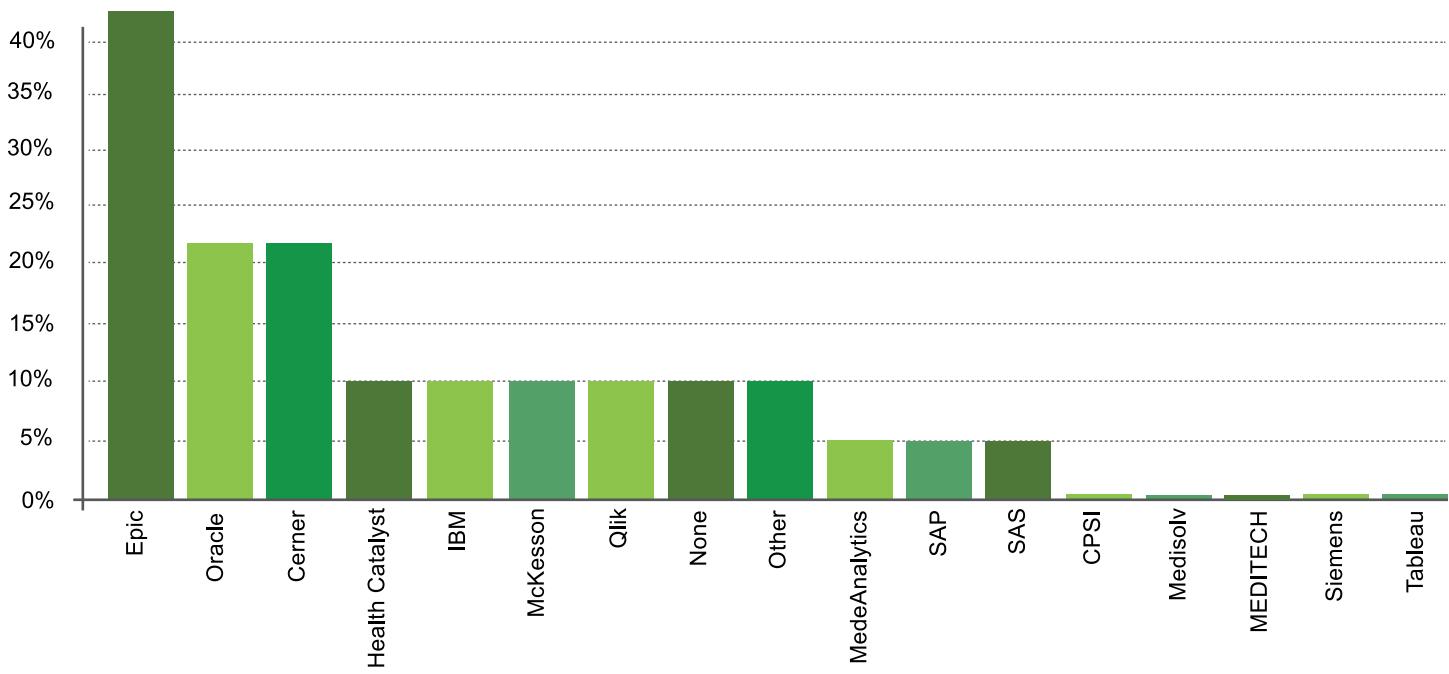


Figure 34: Data Analytics Mindshare > 1000 Beds

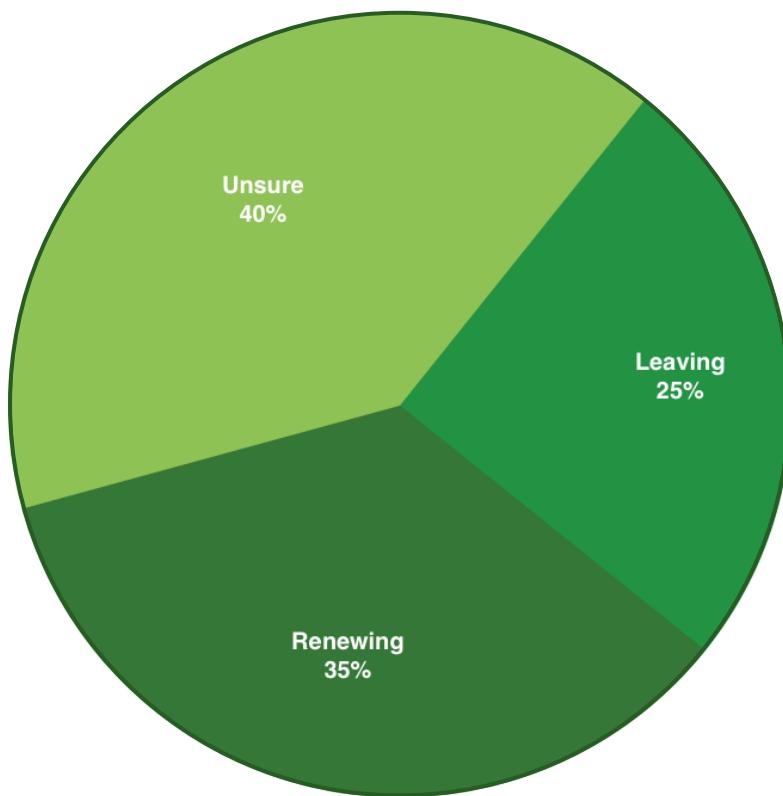


Data Analytics Renewal

With over 26% of hospitals looking to purchase something to help with Data Analytics, there is already a big market. This market gets even bigger when you consider that at least 25% of those with a product are actively looking to leave their existing product offering in favor of solutions that can do more.

Note: We do have specific renewal rates for each unique vendor, but they won't be provided in this report. peer60 would be happy to provide each vendor's renewal rate. Please contact Jeremy Bikman, jbikman@peer60.com, and he can provide that information in a phone call.

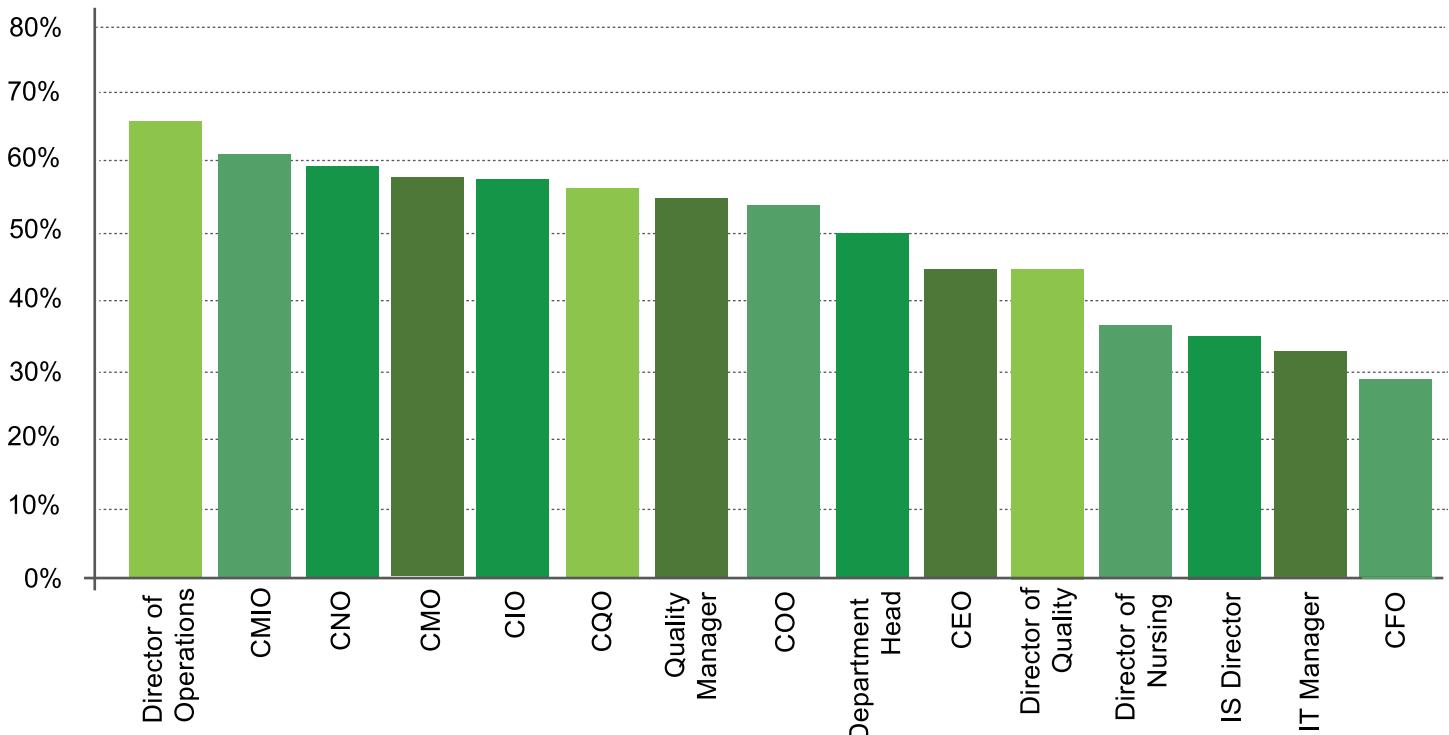
Figure 35: Data Analytics Renewal



Patient Engagement

The critical market for Patient Engagement is still forming as almost 40% of hospitals don't have a solution yet. That isn't stopping hospitals that already have patient engagement solutions from making changes though. A replacement market is developing.

Figure 36: Patient Engagement Purchase Intention by Role



The title breakdown of the purchase intention question indicates that many people within hospitals know what is going on with Patient Engagement. Most C-Level Executives and management in operations and quality seem to be aware of what is happening.

Patient Engagement Market Share

The market for Patient Engagement is still very diverse with a large number of players getting a percentage of the market. While Epic, MEDITECH and Cerner are the biggest players, as we saw in the EHR market, they play in different spaces as the breakdowns by hospital size clearly show:

- The smallest facilities are often still acquiring Patient Engagement solutions; however, CPSI leads market share in this category
- MEDITECH controls its sweet spot of 100-250 beds
- Epic and Cerner lead among hospitals with 251-500 beds and over 1000 beds
- Allscripts is tied with Epic for the lead among hospitals with 501-1000 beds

Figure 37: Patient Engagement Market Share

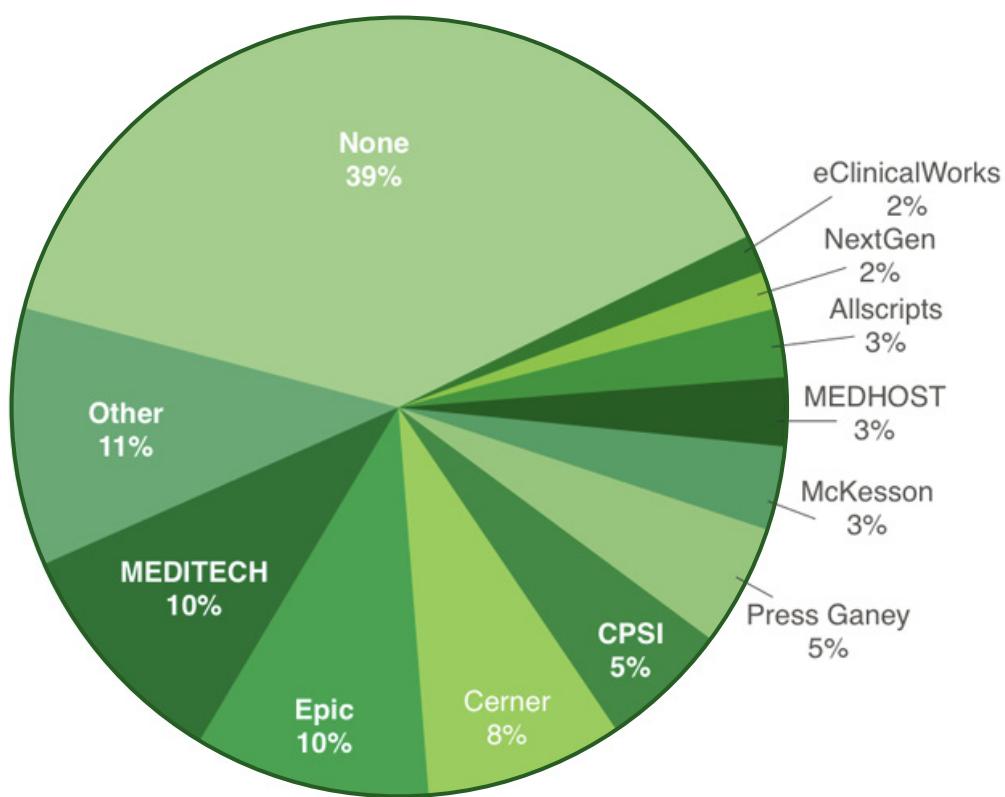


Figure 38: Patient Engagement Market Share <100 Beds

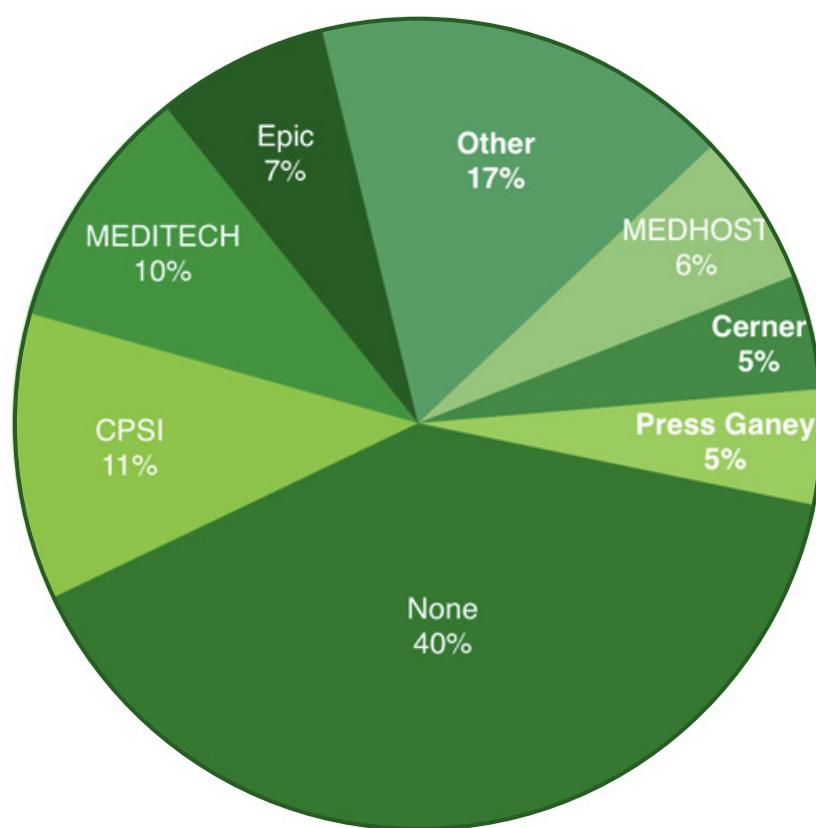


Figure 39: Patient Engagement Market Share 100-250 Beds

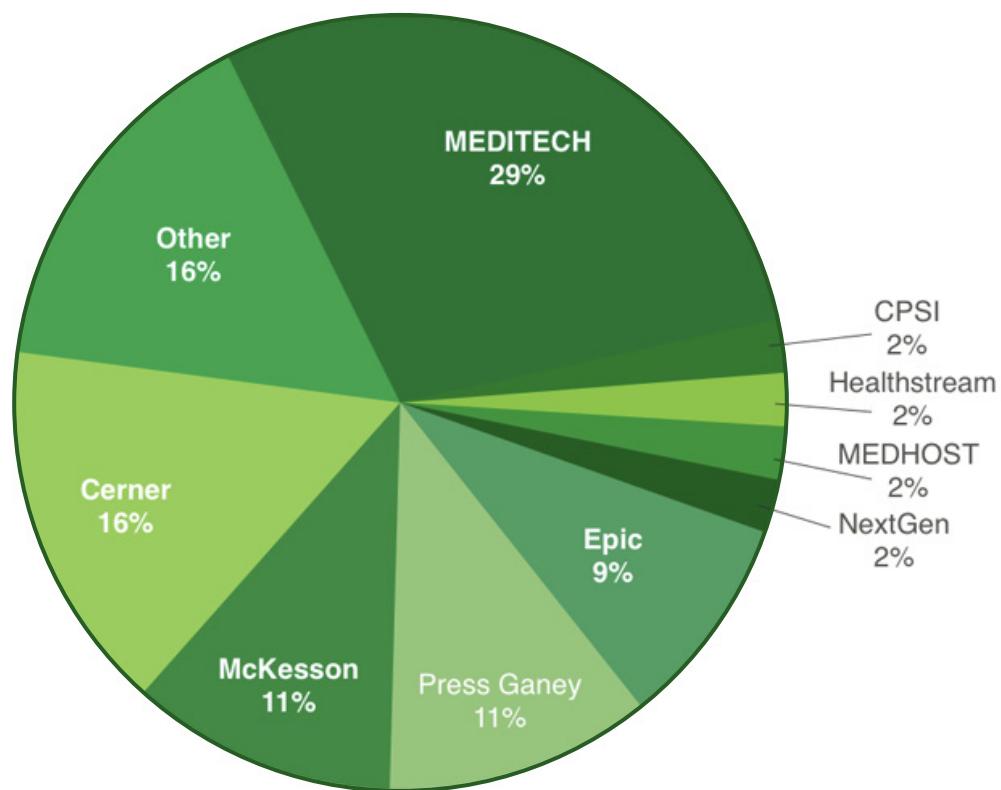


Figure 40: Patient Engagement Market Share 251-500 Beds

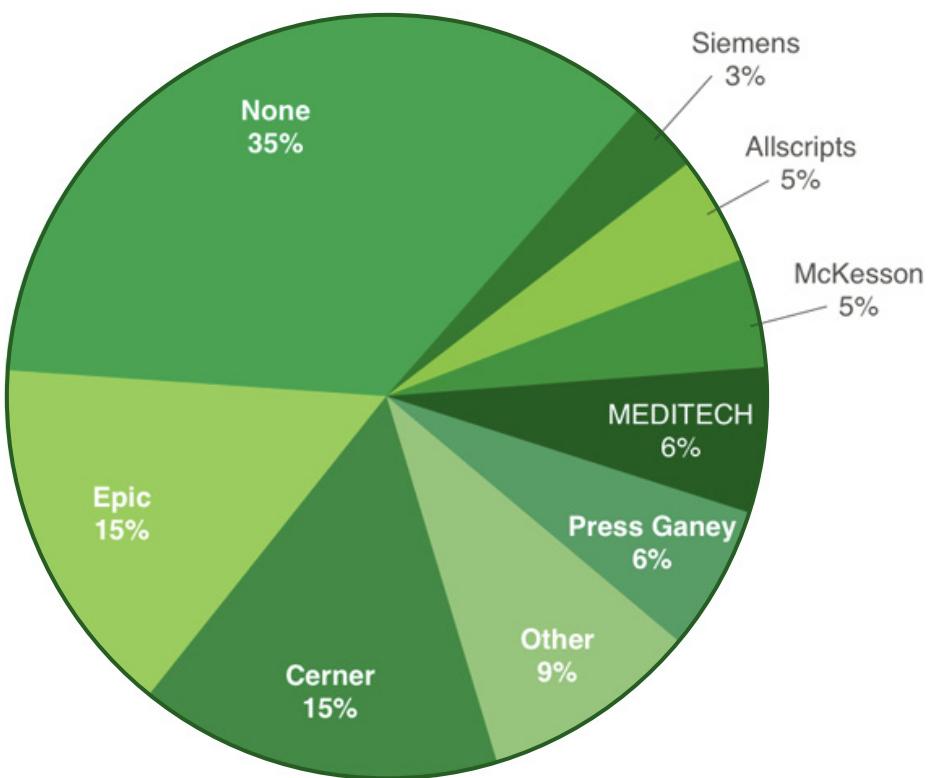


Figure 41: Patient Engagement Market Share 501-1000 Beds

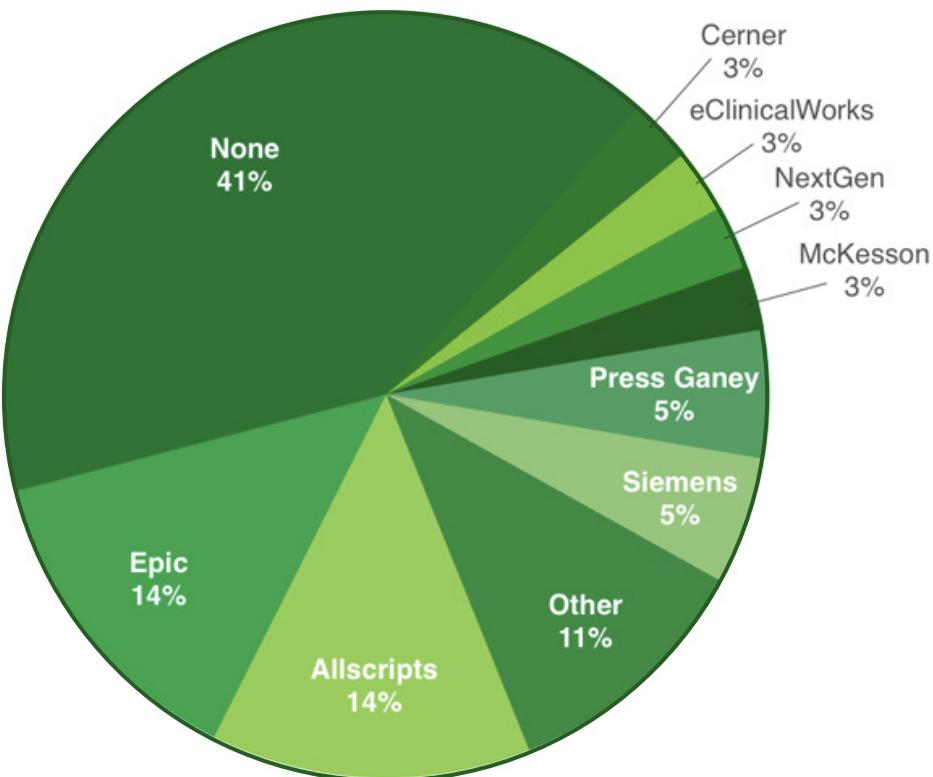
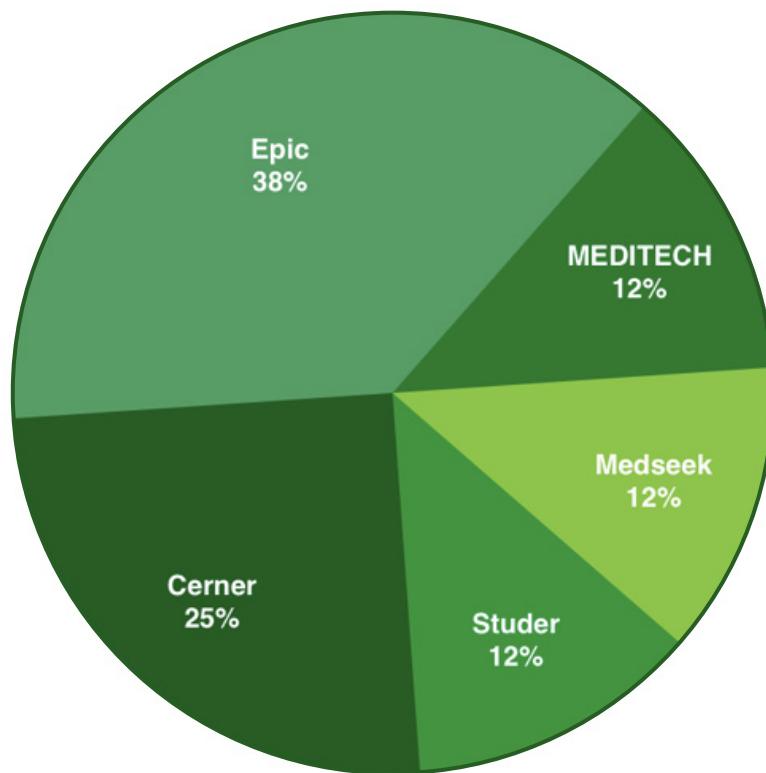


Figure 42: Patient Engagement Market Share > 1000 Beds



Patient Engagement Mindshare

Over 20% of those looking to address Patient Engagement in 2015 don't know who they are looking at. That means mindshare in this space is wide open (a healthcare marketers dream!); however, there are currently leaders among various hospital sizes.

- Cerner and Epic lead overall and among hospitals with at least 251 beds
- CPSI wins among the smallest providers
- MEDITECH leads among hospitals with 100-250 beds

Figure 43: Patient Engagement Mindshare

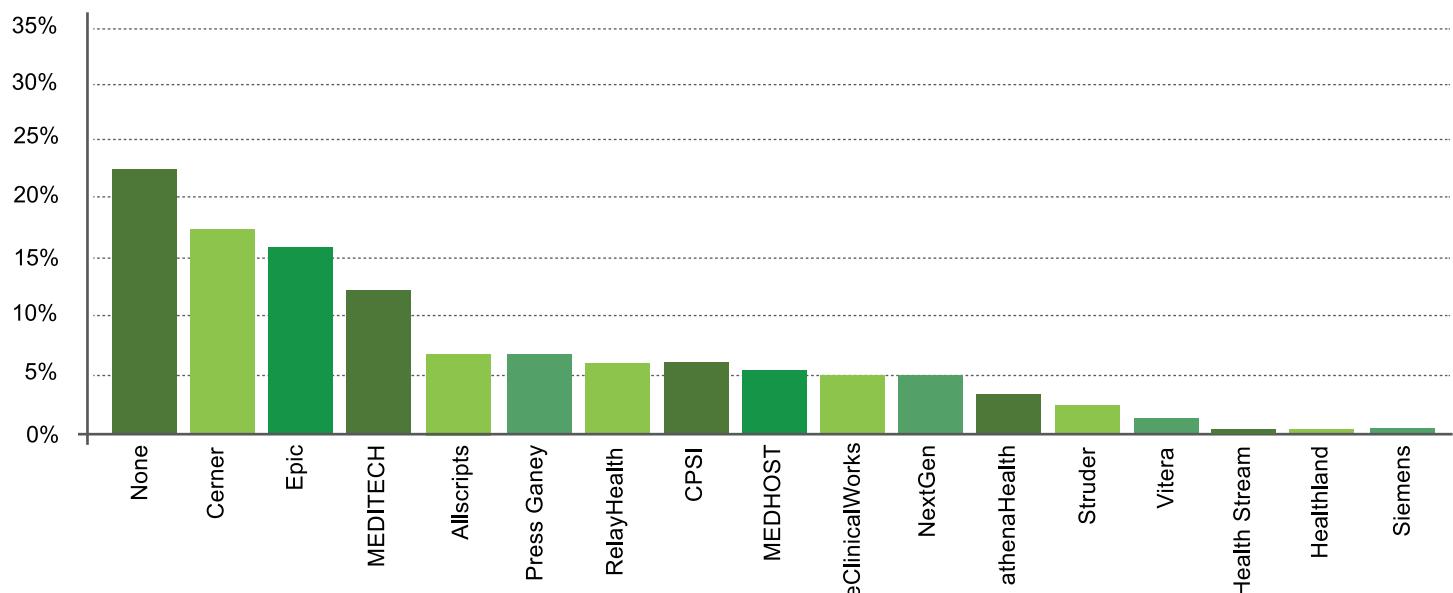


Figure 44: Patient Engagement Mindshare < 100 Beds

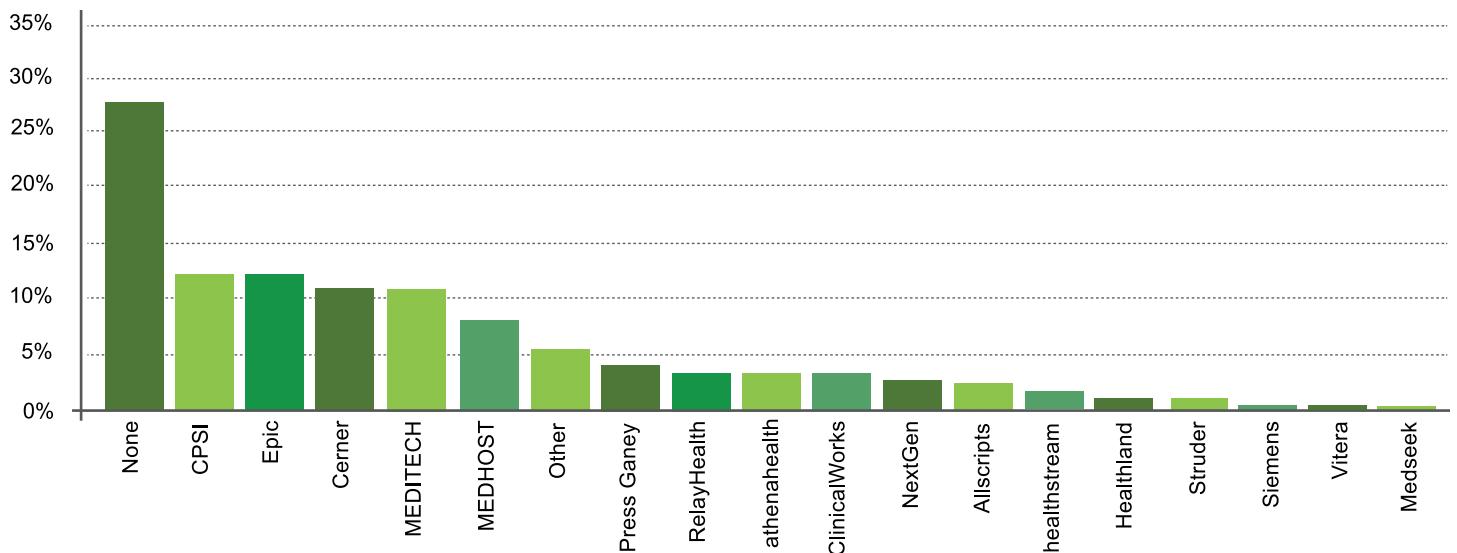


Figure 45: Patient Engagement Mindshare 100-250 Beds

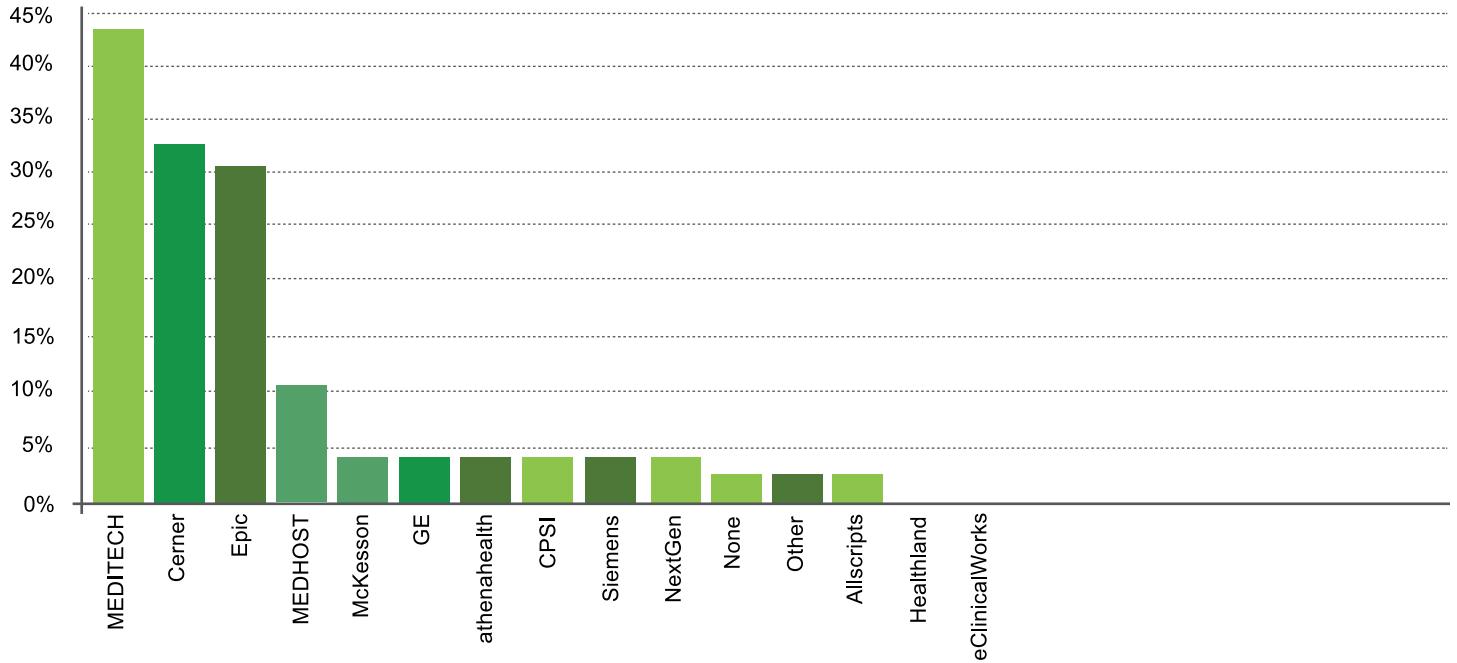


Figure 46: Patient Engagement Mindshare 251-500 Beds

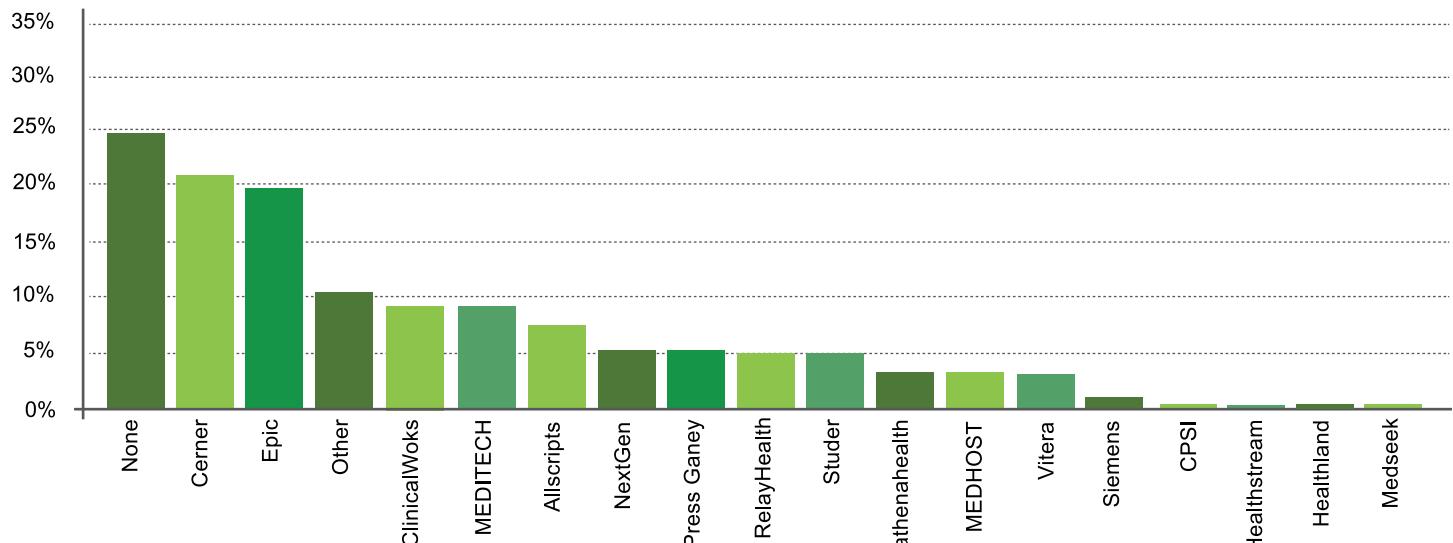


Figure 47: Patient Engagement Mindshare 501-1000 Beds

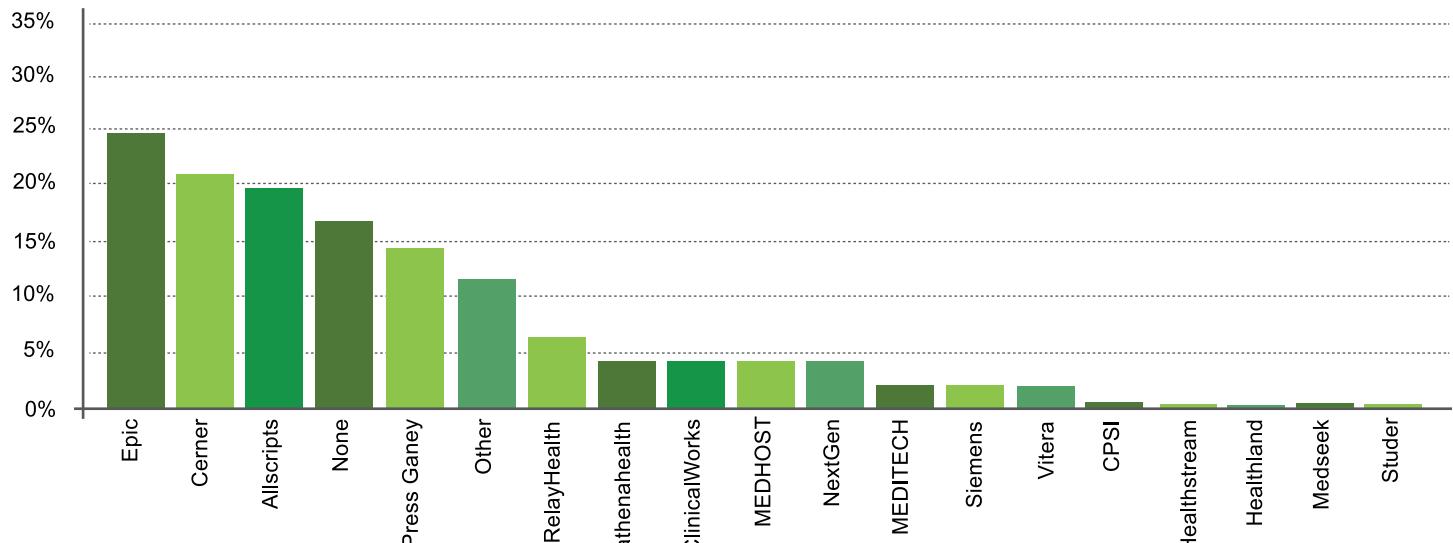
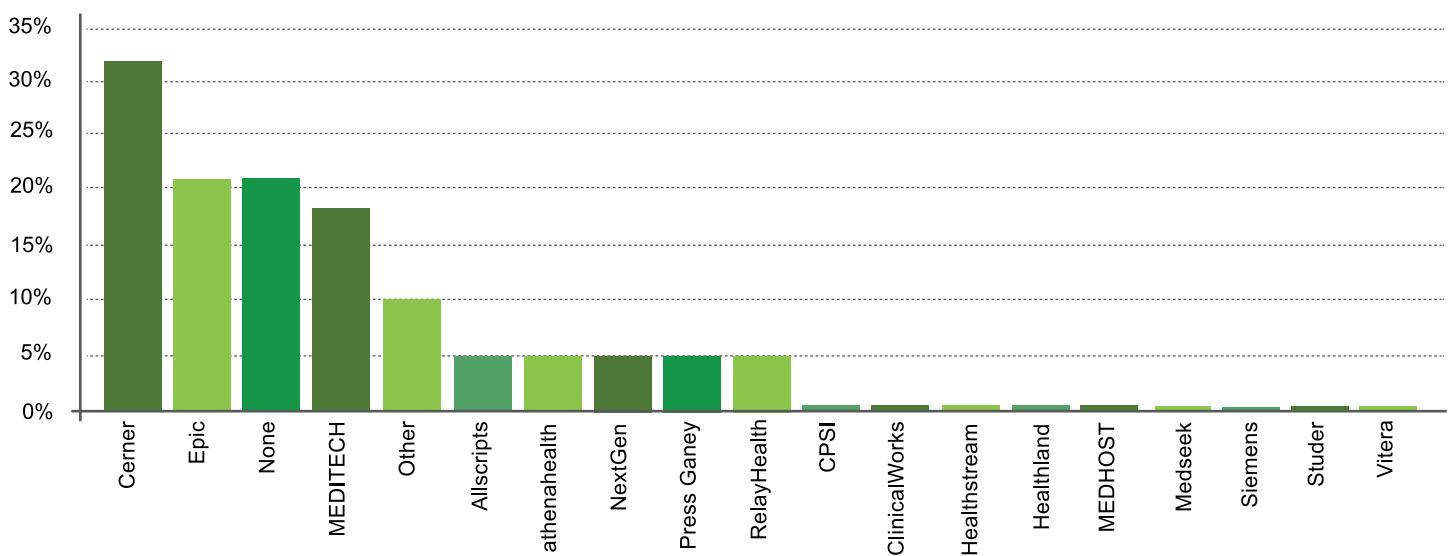


Figure 48: Patient Engagement Mindshare > 1000 Beds





Allscripts

While Allscripts still has a decent number of inpatient EHR customers (and a very large install base in the ambulatory EHR market), it has been focusing more and more on moving beyond the EHR to provide solutions to engage patients and to coordinate their care. As such they are beginning to gain a foothold in these areas, as the results show.

Allscripts' Take

Allscripts provides innovative solutions that empower all stakeholders across the healthcare continuum to deliver world-class outcomes. Our clinical, financial, connectivity and information solutions for hospitals, physician practices and post-acute organizations are the essential technologies that enable A Connected Community of Health®. We believe that outcomes are generated through the synergies that a connected community creates.

The key to a thriving healthcare community is coordinated care across every setting: from the physician's office to the hospital to post-acute settings and even the patient's own home. We are dedicated to helping our clients achieve outcomes across the care continuum by providing solutions that help address their unique needs.

Our foundation for hospitals and health systems is built on a flexible and industry-recognized technology platform that focuses on connecting information and streamlining processes across clinical, financial and operational processes. We provide an adaptable infrastructure that can support Accountable Care, Pay for Performance and other industry models and programs without compromising on delivering outcomes such as improved care quality.

Solutions Across the Enterprise

Allscripts provides core clinical and core financial solutions, as well as other solutions to help hospitals and health systems thrive in a value-based care environment. Each solution area can be combined and tailored to meet an individual organization's needs, providing minimum risk and maximum control to help drive achievement of positive clinical, financial and operational outcomes.

Core Clinical

Core clinical solutions ensure that organizations have put the right clinical system in the hands of providers to drive towards best-practice coordinated care for patients. Core clinical solutions can provide enterprise-wide, evidence-based guidelines while improving clinical workflow. Additionally, these solutions help you meet regulations of today and tomorrow while driving towards a single patient record and allowing for the most cost-effective, quality care by providing visibility across the care continuum.

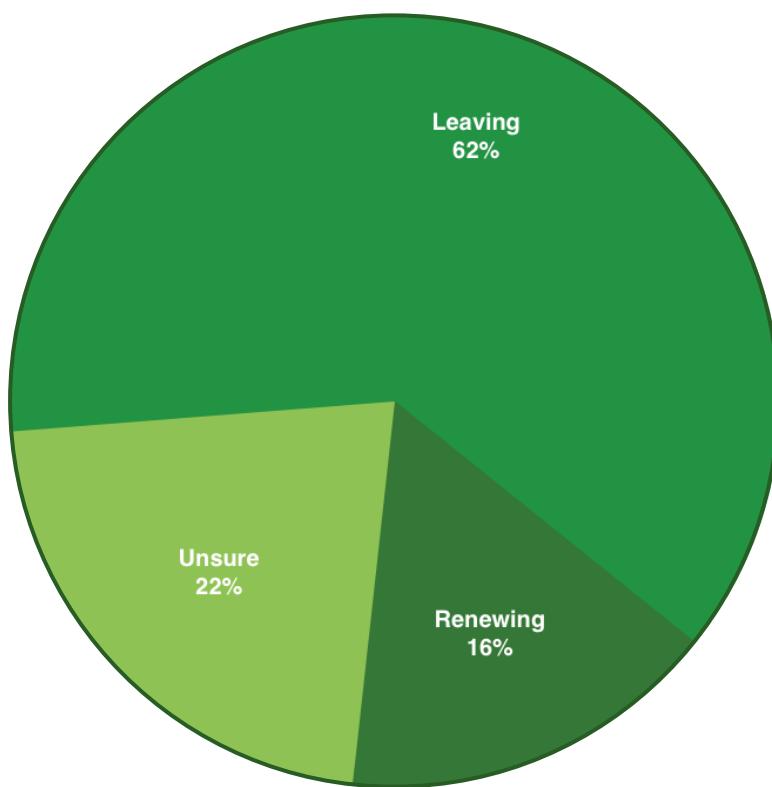


Patient Engagement Renewal

With 48% of hospitals addressing Patient Engagement in 2015 and a majority of those who are definitely leaving their current vendor, there is a big replacement market in the realm of patient engagement.

Note: We do have specific renewal rates for each unique vendor, but they won't be provided in this report. peer60 would be happy to provide each vendor's renewal rate. Please contact Jeremy Bikman, jbikman@peer60.com, and he can provide that information in a phone call.

Figure 49: Patient Engagement Renewal

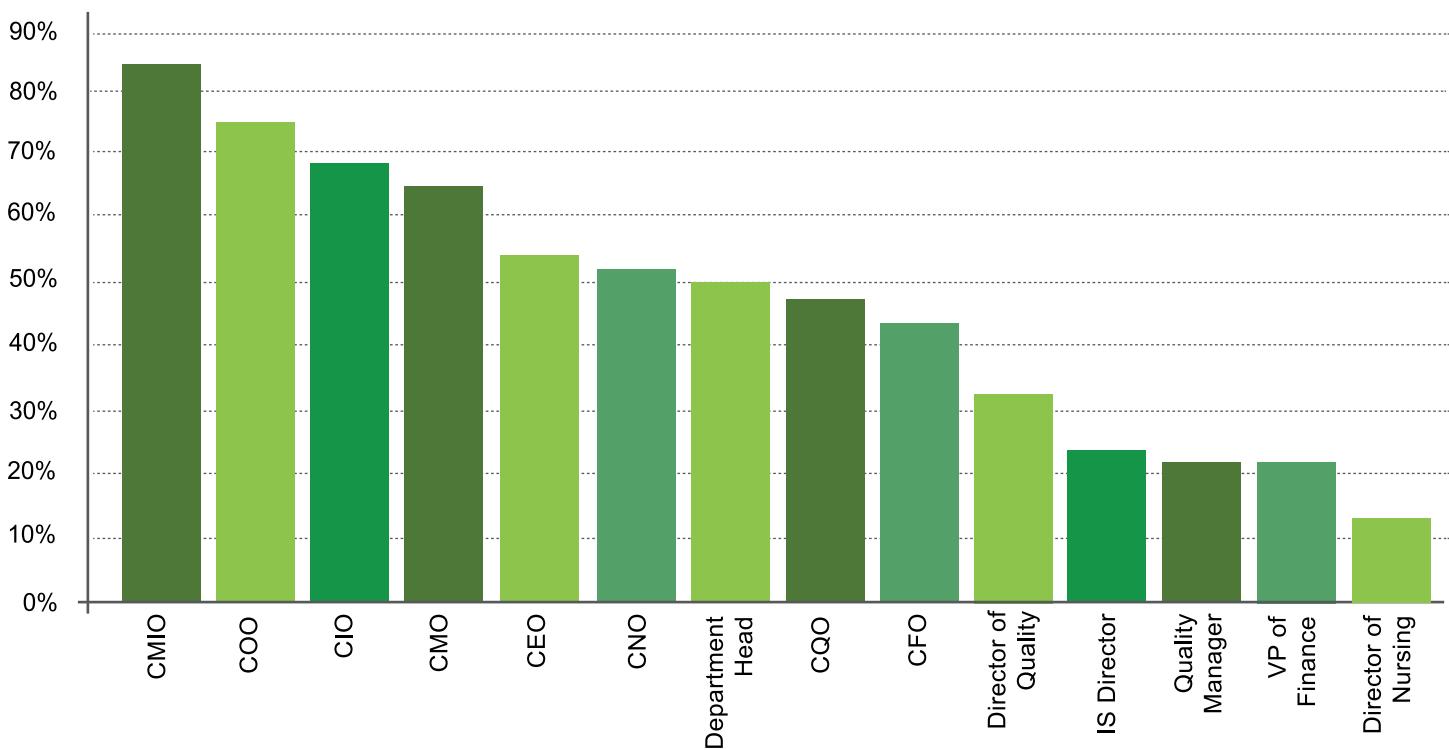


Population Health Management

Over 50% of hospitals will be selecting a new Population Health Management solution this year. This makes quite a bit of sense given that legislation is forcing hospitals to move towards value and quality of patient care. As such, Population Health Management is definitely top of mind for quite a few hospital executives.

In other words, the Population Health Management market in 2015 is going to be absolutely gigantic.

Figure 50: Population Health Management Purchase Intention by Role



Population Health Management Market Share

With the market as big as it is (and will become), it should be even more heartening for vendors that there isn't really a power player dominating...yet. Not a single vendor has more than 10% market share.

- The always popular None and Other are the largest vote getters in most hospital size categories
- McKesson, The Advisory Board and MEDITECH do well among smaller facilities
- Epic, Allscripts and Optum garner a lot of interest among larger facilities
- Cerner shows up at nearly every hospital size

Figure 51: Population Health Management Market Share

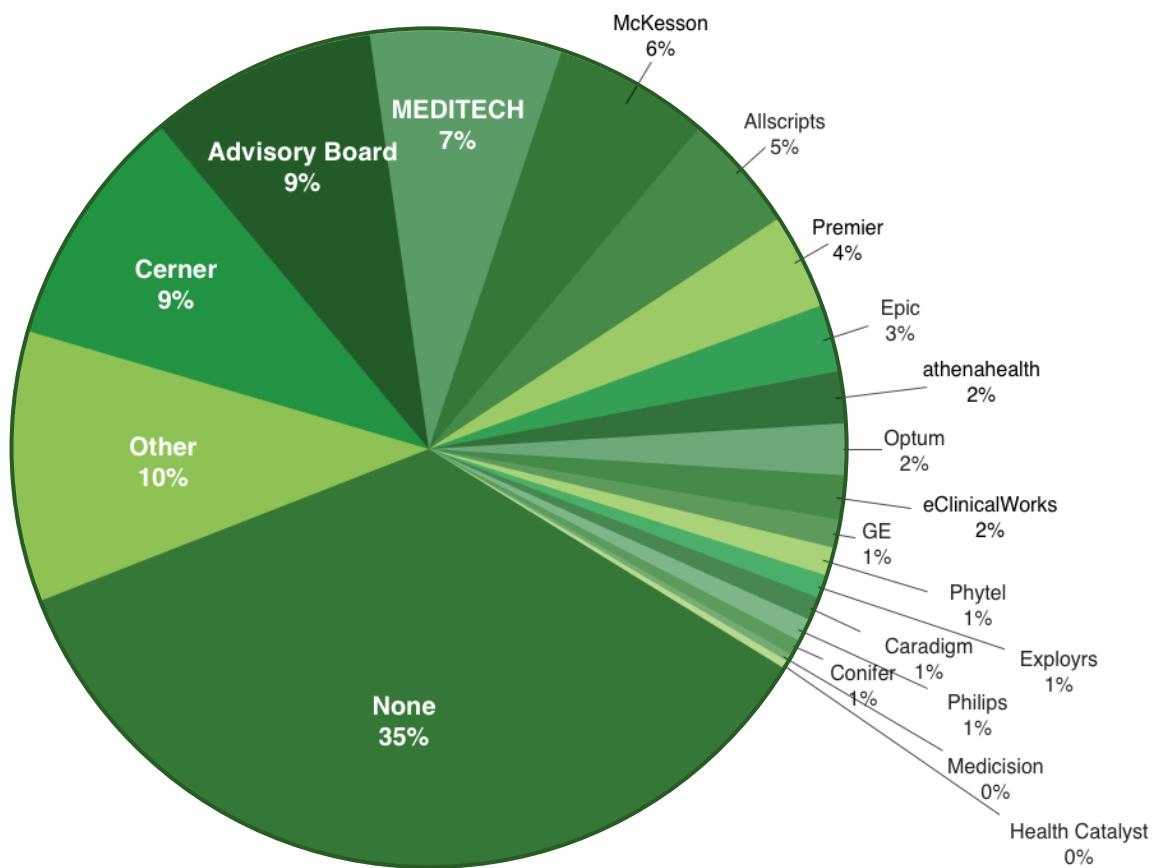


Figure 52: Population Health Management Market Share < 100 Beds

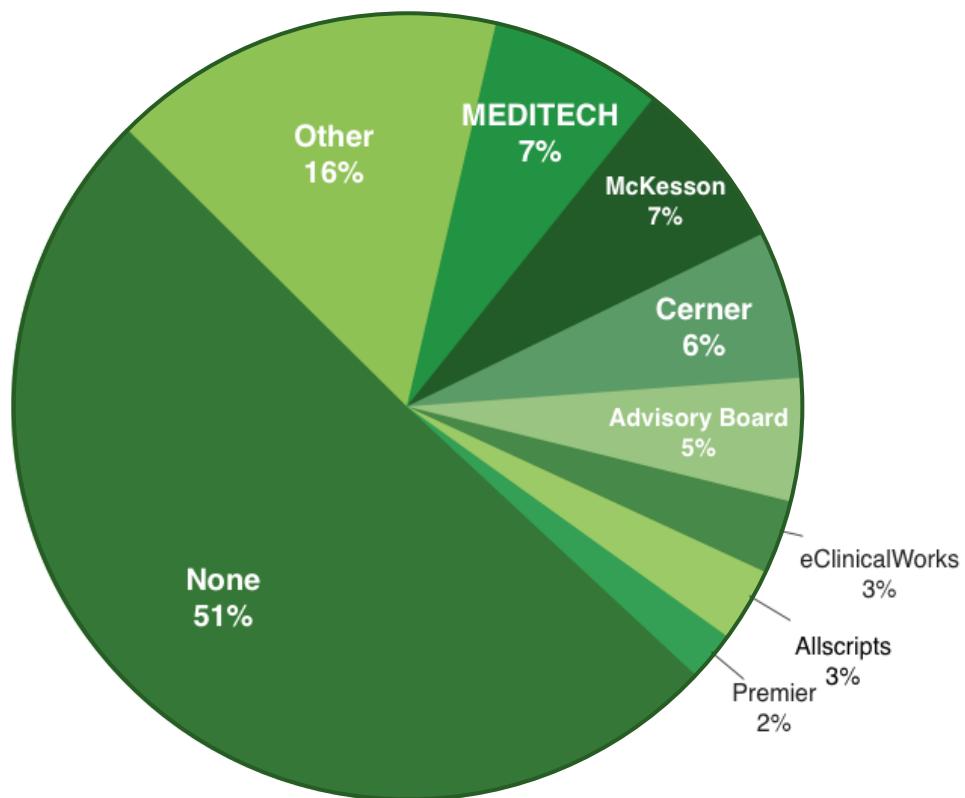


Figure 53: Population Health Management Market Share 100-250 Beds

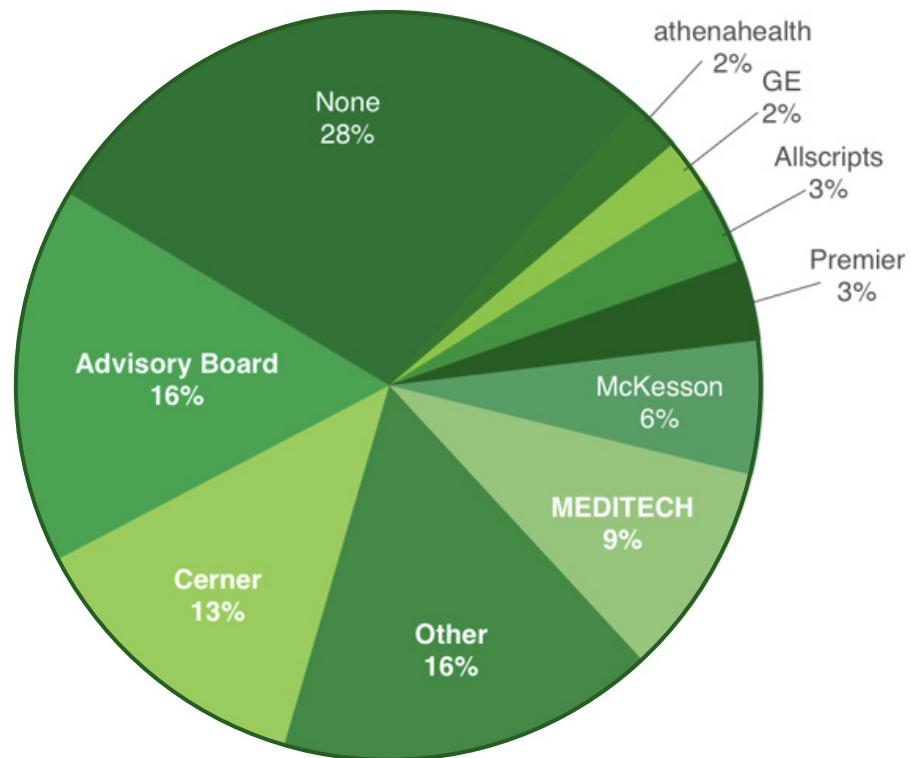


Figure 54: Population Health Management Market Share 251-500 Beds

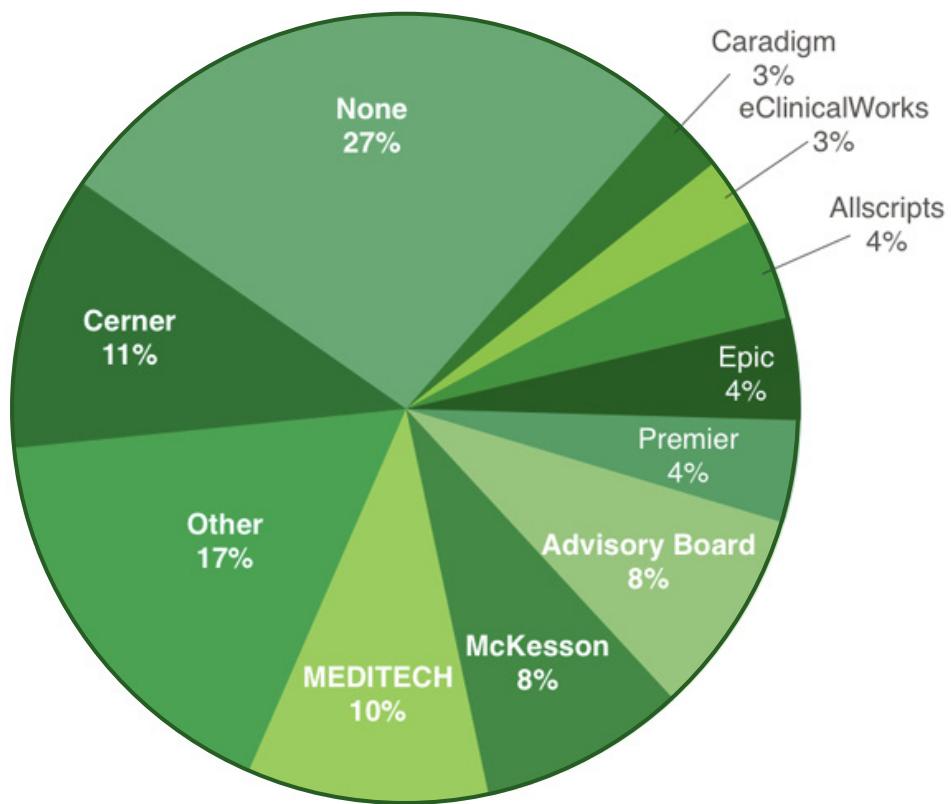


Figure 55: Population Health Management Market Share 501-1000 Beds

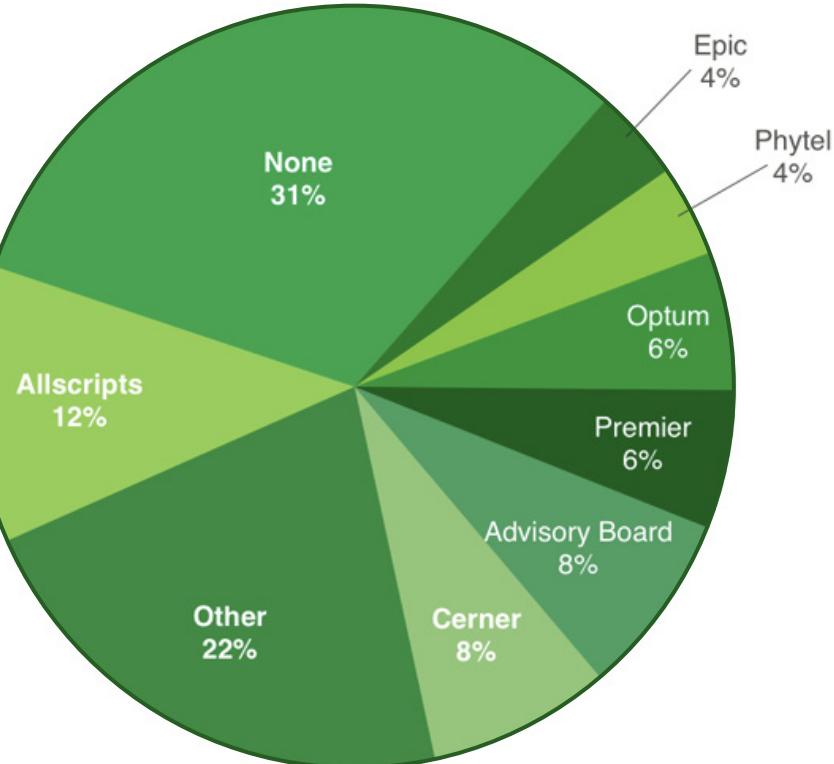
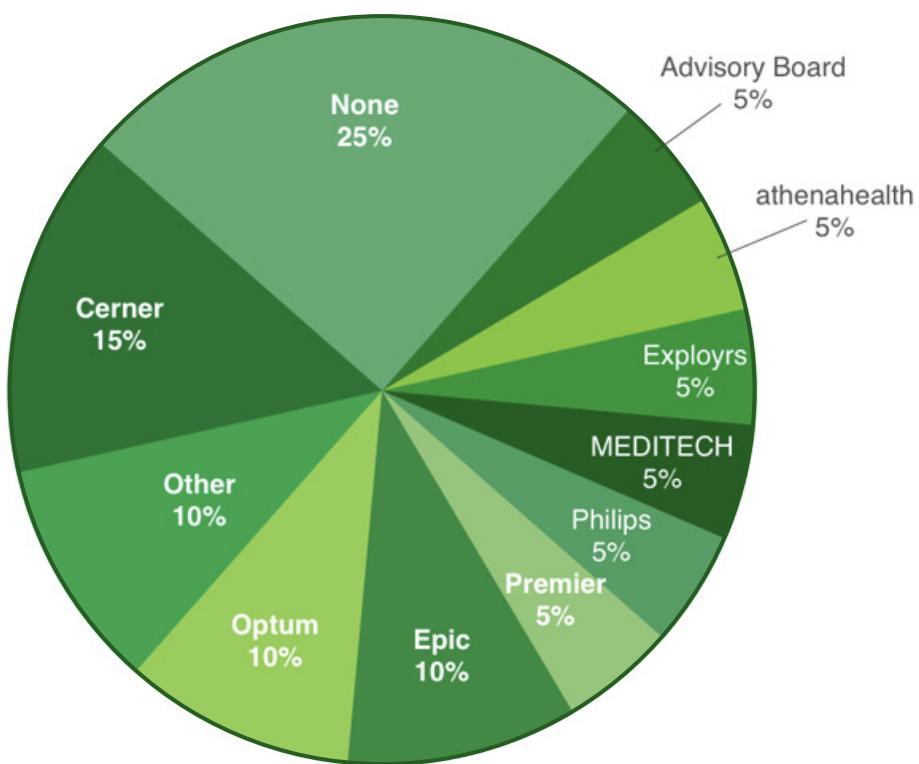


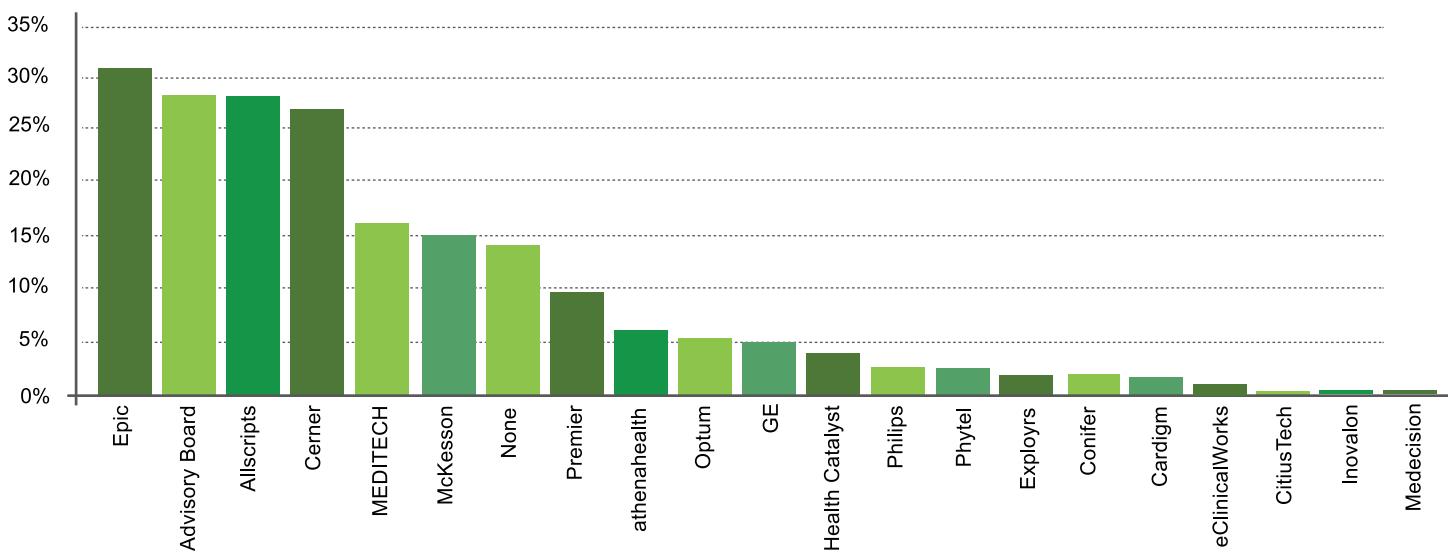
Figure 56: Population Health Management Market Share > 1000 Beds



Population Health Management Mindshare

- Epic, The Advisory Board, Allscripts and Cerner lead the overall pack when it comes to Population Health Management mindshare but the breakdowns change depending upon the size of facility.
- McKesson, MEDITECH, The Advisory Board and Allscripts have the top mindshare numbers among smaller facilities
- As with many product lines, Epic starts to take over the mindshare among facilities from 251-500 beds and leads for larger facilities
- Cerner competes strongly with Epic in the 251-500 space and among the largest hospitals

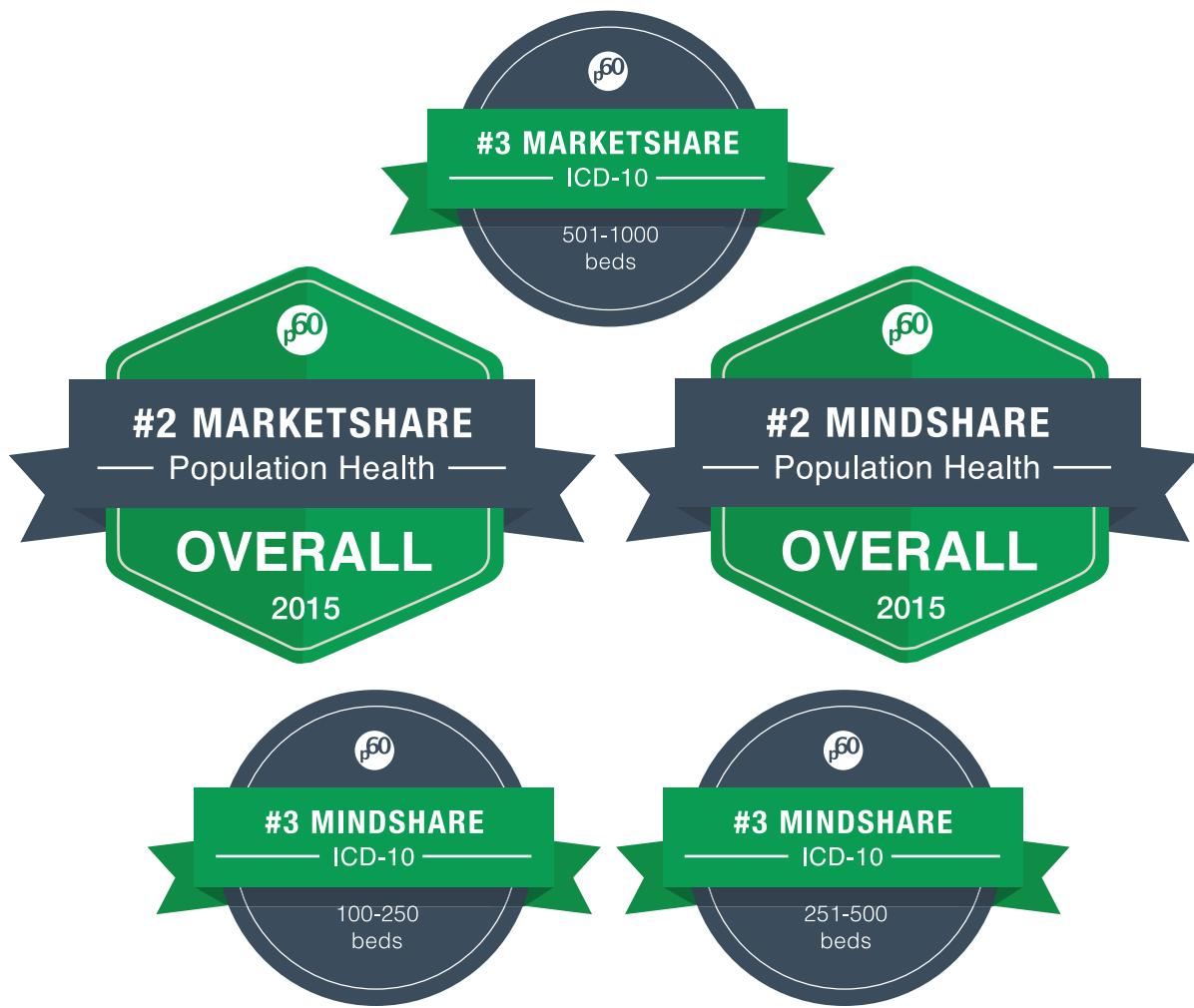
Figure 57: Population Health Management Mindshare





The Advisory Board

The Advisory Board has 10% of the Population Health Management market (second largest individual market share for the product line) and does some work helping providers transition to ICD-10. Its current market share in Population Health Management is highest among hospitals with 100-250 beds, but the mindshare for 2015 suggests this may expand dramatically.



The Advisory Board's Take

Advisory Board Company
Performance Technology
In Numbers

1,800+

Hospitals deployed on
our technology

550K+

Physicians profiled on
performance

60%+

Admissions flowing
through our platforms

10M+

At-risk lives managed
using our technology

1.2B+

Practitioner-level claims
in total market database

\$700M+

Value realized from our
technology annually

Health Care's Proven Performance Improvement Platform

Purposefully Built for Successful Execution on Value-Based Care Imperatives



MARGIN IMPROVEMENT

Cost Reduction and Revenue Cycle Management

- Increase workforce efficiency
- Manage supply chain
- Reduce avoidable clinical costs
- Protect and capture revenue

Workforce. Labor cost analytics and enterprise-wide workforce management dashboard.

Clinical Sourcing. Supplier-neutral sourcing platform and automated cost analyses.

Surgical Profitability. OR capacity and surgical pricing analytics.

Eligibility and Patient Payment. Patient payment estimation and point-of-service collections..

Coding and Documentation. Coding accuracy, CDI and post-payment audit management.

Denials and Underpayments. Payment variance tracking, contract compliance analytics.



GROWTH

Physician, Consumer, Payer and Employer Strategies

- Design growth strategy
- Build a high-value network
- Minimize referral leakage
- Attract and satisfy consumers

Market Intelligence. Total market analytics on physician activity and connections.

Physician Relationships. Mobile PRM workflow technology with real-time outreach tracking.

Referral Workflow. EMR-agnostic referral management platform for seamless referral transfer.

Leakage Analytics. Algorithmic patient-provider matching and real-time leakage detection.

Online Scheduling. Cloud-based physician-to-physician and patient self-scheduling portal.

Patient Experience. Mobile patient rounding platform for real-time service recovery.



CARE TRANSFORMATION

Provider Alignment and Population Health

- Engage physicians
- Improve practice performance
- Secure, manage at-risk lives
- Deliver proactive care

Physician Performance. Severity-adjusted comparative physician utilization, quality analyses.

Medical Groups. Cost, productivity and revenue analytics for employed physician practices.

Clinical Integration. Cross-continuum physician performance management for CI programs.

Risk-Based Contracts. Payment modeling, benchmarks and predictive analytics for managing covered lives.

Care Management. Integrated patient data and automated care plan customization and workflows.

Clinical Risk Surveillance. Real-time risk detection using structured data and free text analytics.

Figure 58: Population Health Management Mindshare < 100 Beds

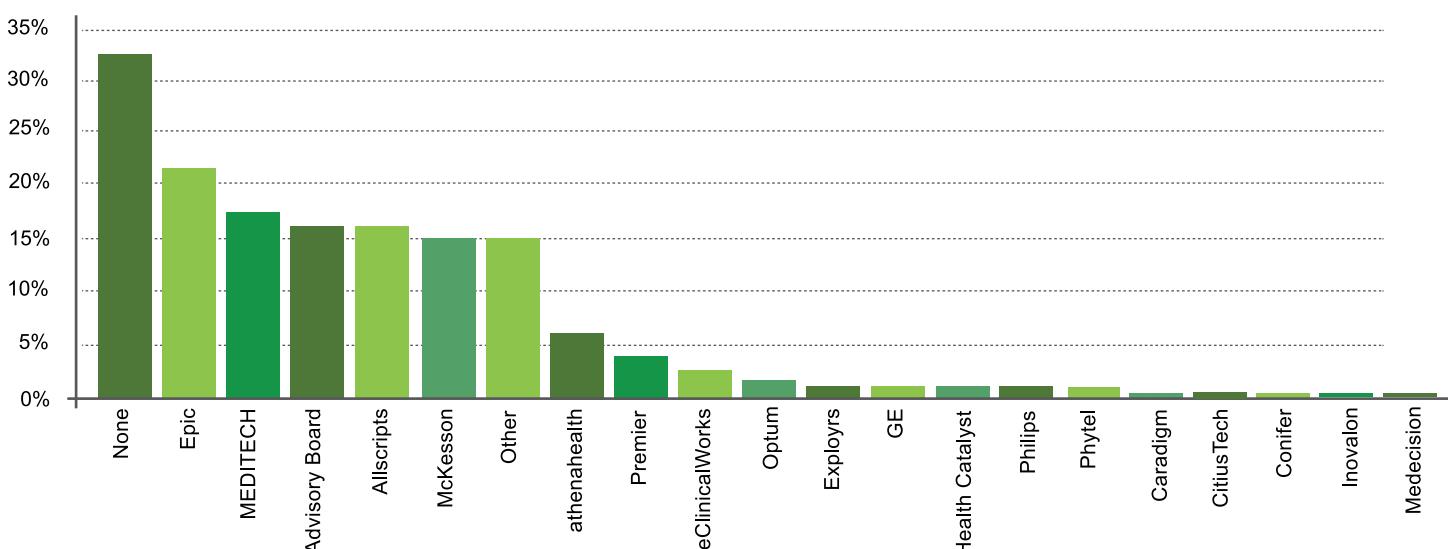


Figure 59: Population Health Management Mindshare 100-250 Beds

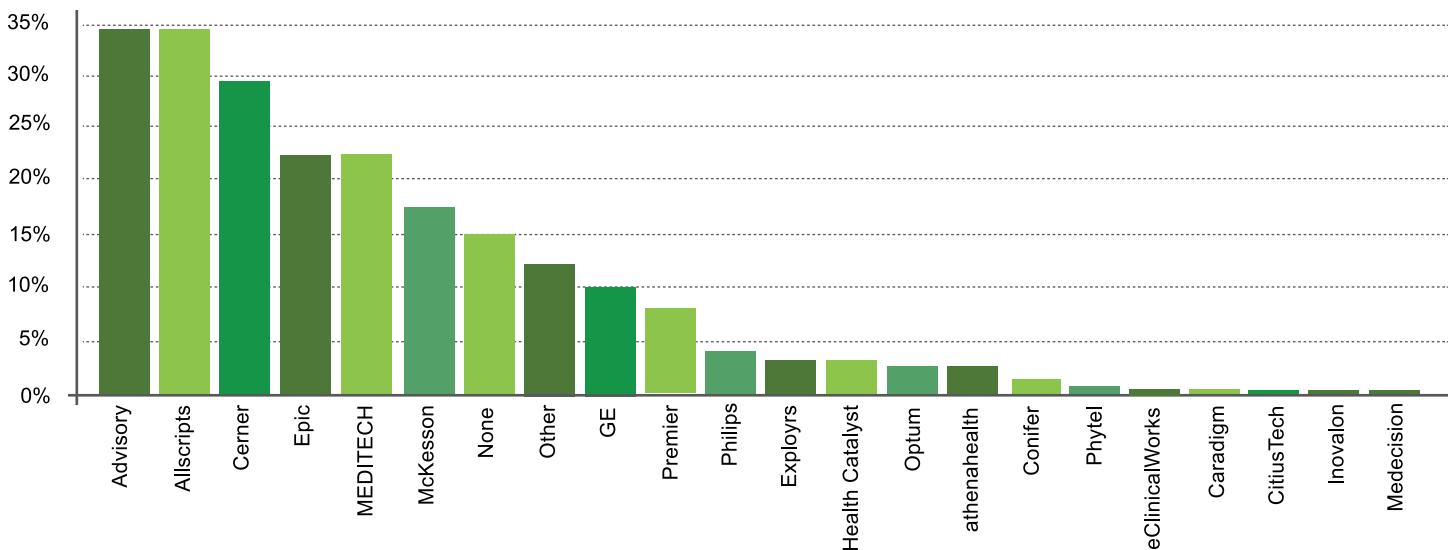


Figure 60: Population Health Management Mindshare 251-500 Beds

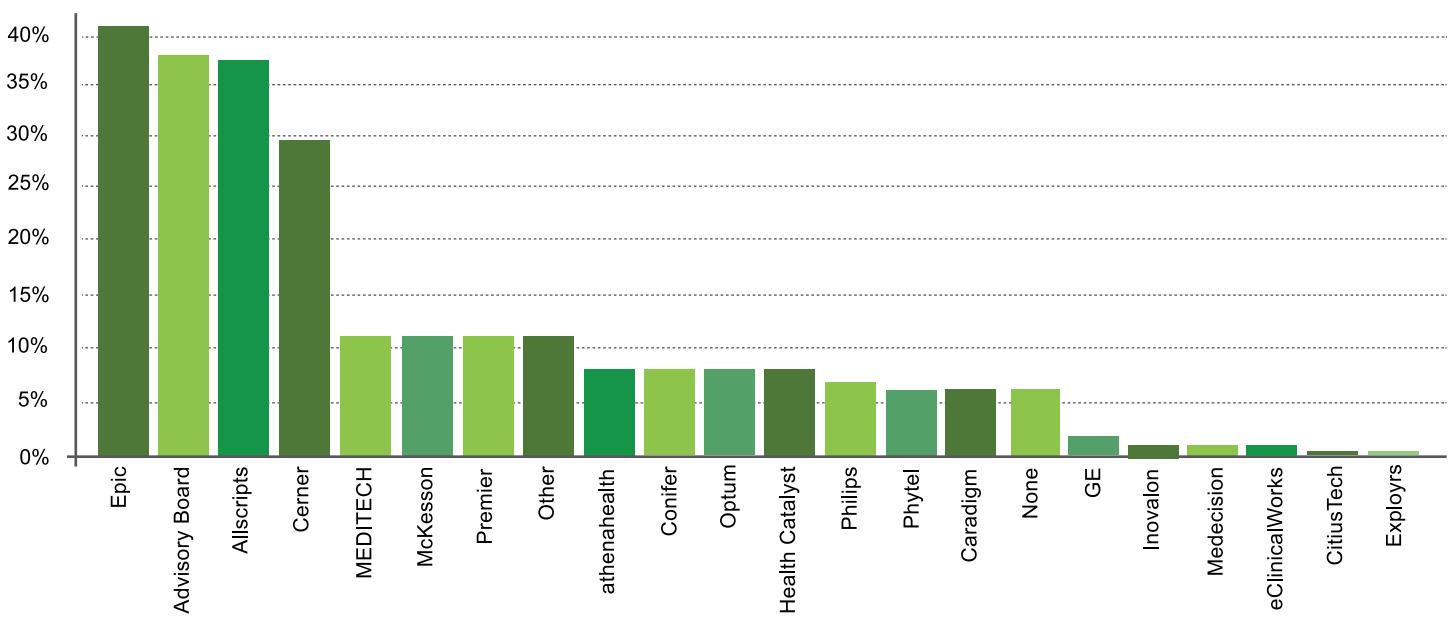


Figure 61: Population Health Management Mindshare 501-1000 Beds

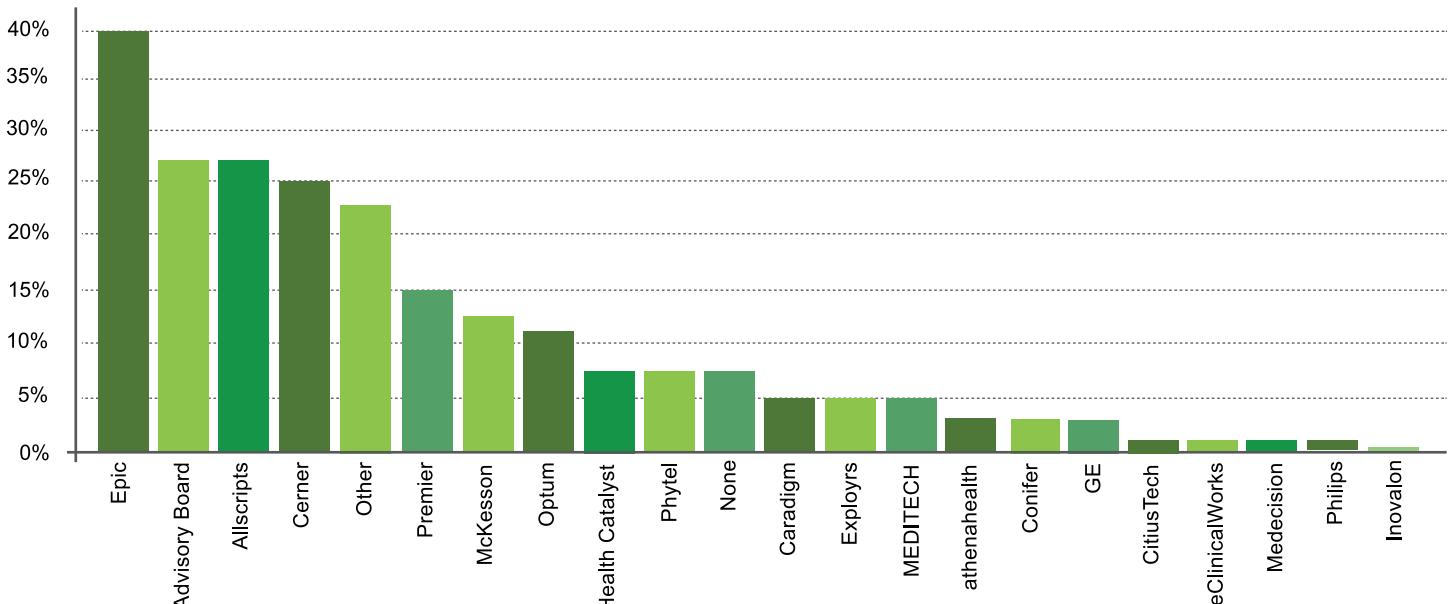
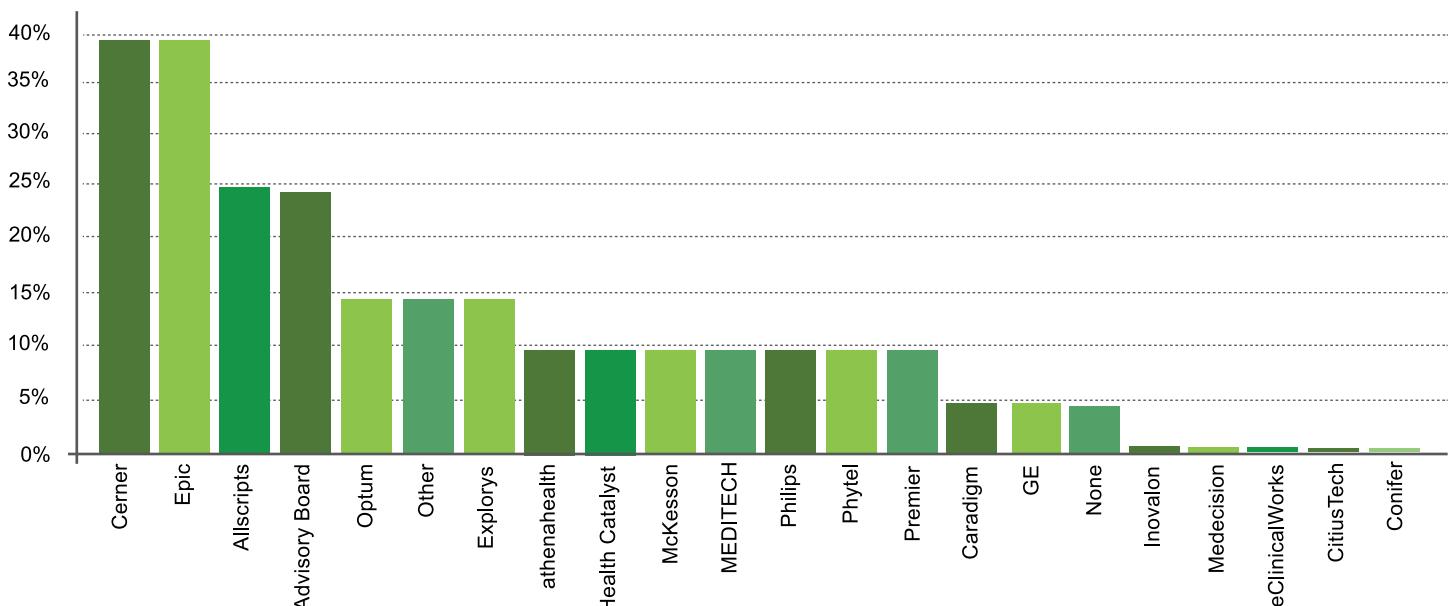


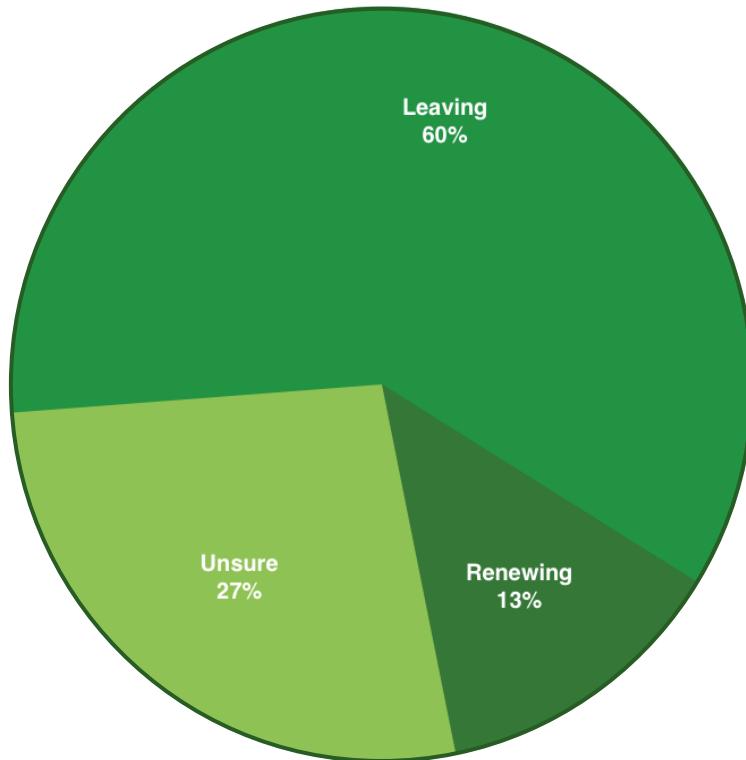
Figure 62: Population Health Management Mindshare >1000 Beds



Population Health Management Renewal

There is a growing replacement market in the world of Population Health Management. A solid percentage of those who are addressing Population Health Management will be replacing an existing product.

Figure 63: Population Health Management Renewal

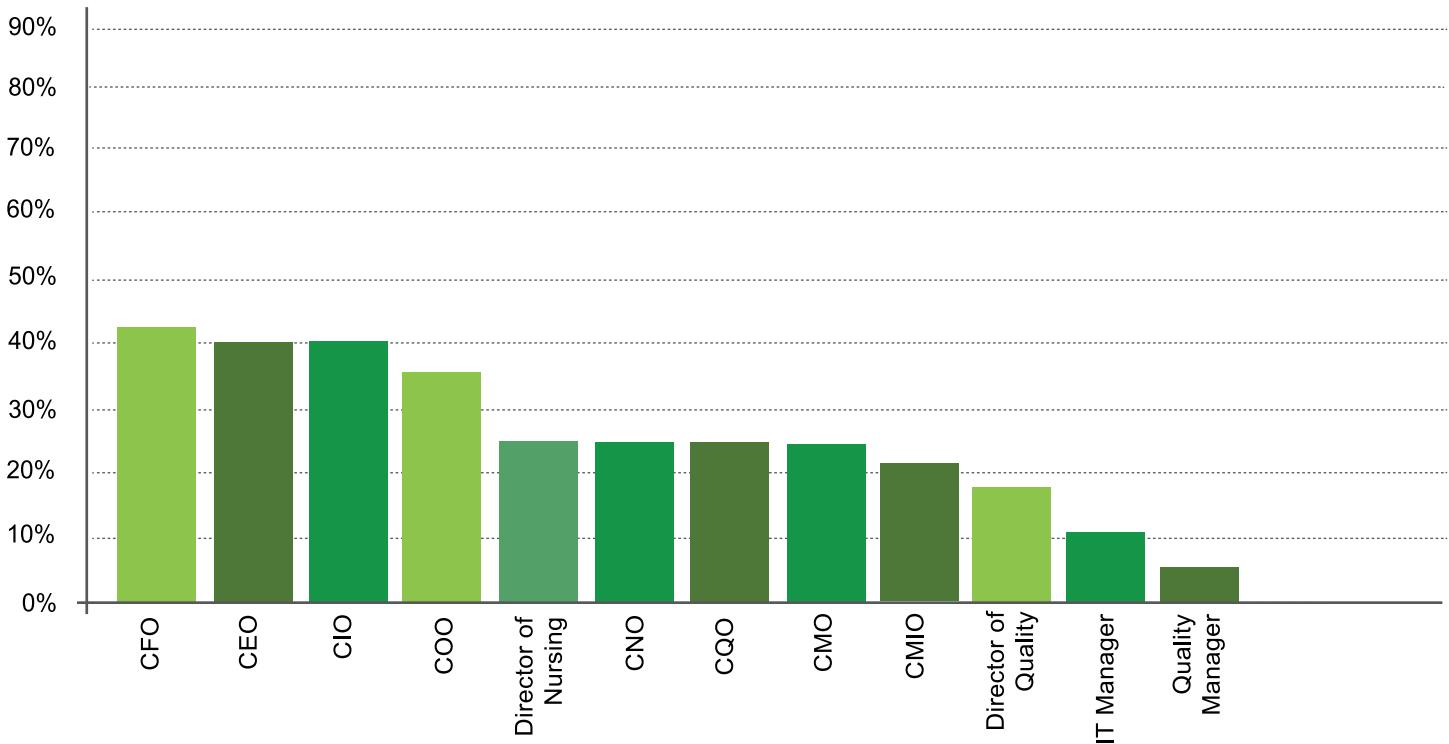


Revenue Cycle Management

Over 31% of hospital leaders said they were going to purchase a revenue cycle management solution in 2015.

The purchase intention may be even higher than that, however, as over 42% of CFOs said they intend to purchase an RCM product.

Figure 64: Revenue Cycle Management Purchase Intention by Role



RCM Market Share

McKesson leads overall market share in the RCM market and plays well in almost every category. However, McKesson's lead accounts for only 18% of the market, so there is plenty of space for other vendors to compete:

- Nearly a quarter of the smallest facilities don't have a go-forward RCM solution yet, but they are looking
- Cerner and 3M lead among those with 100-250 beds
- Epic and McKesson lead among facilities with at least 251 beds

Figure 65: Revenue Cycle Management Market Share

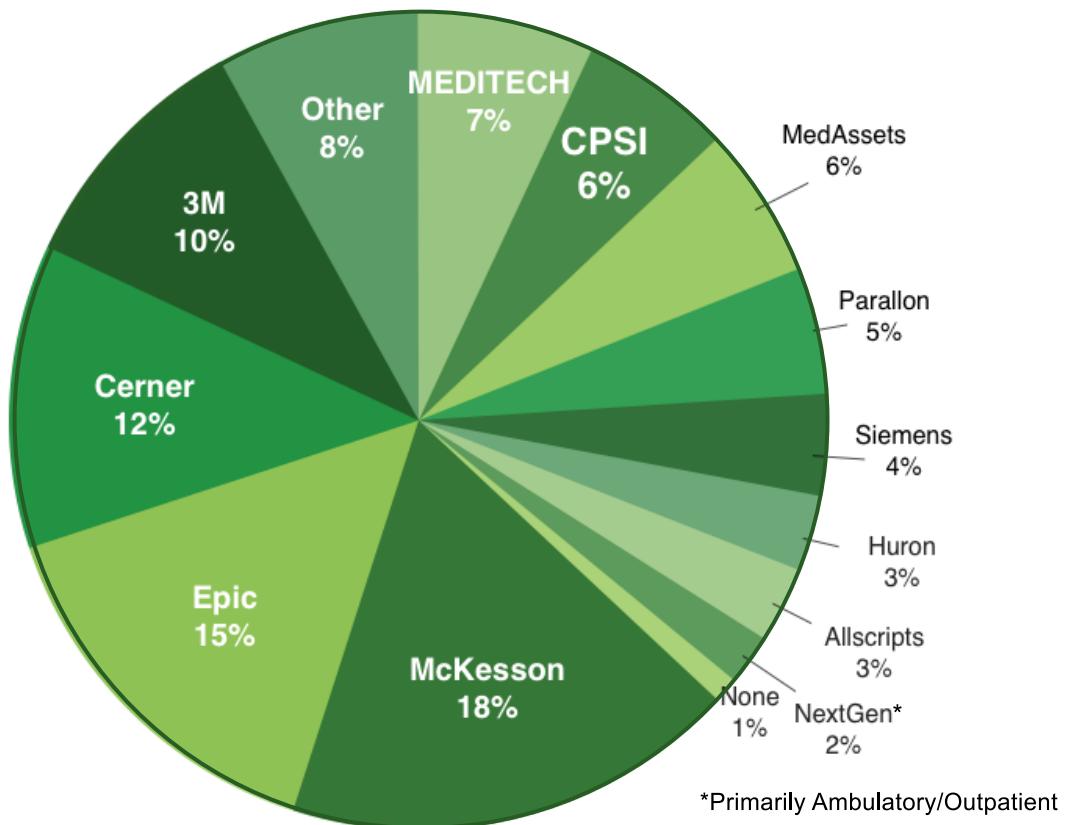


Figure 66: Revenue Cycle Management Market Share <100 Beds

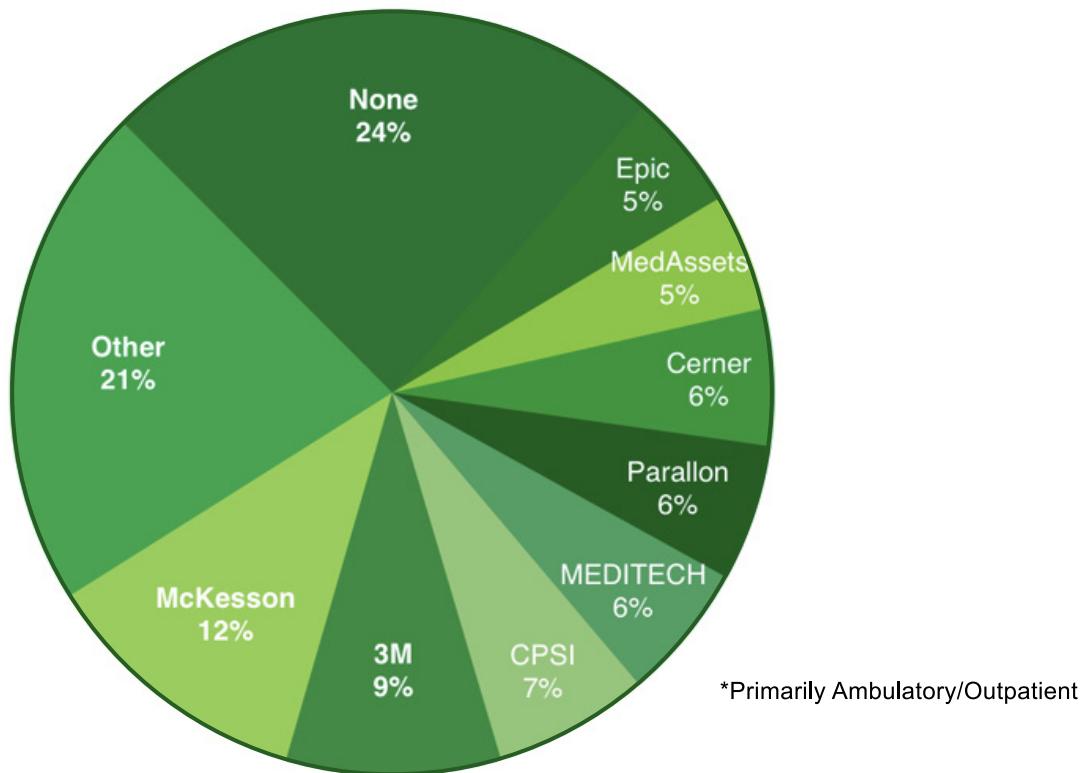


Figure 67: Revenue Cycle Management Market Share 100-250 Beds

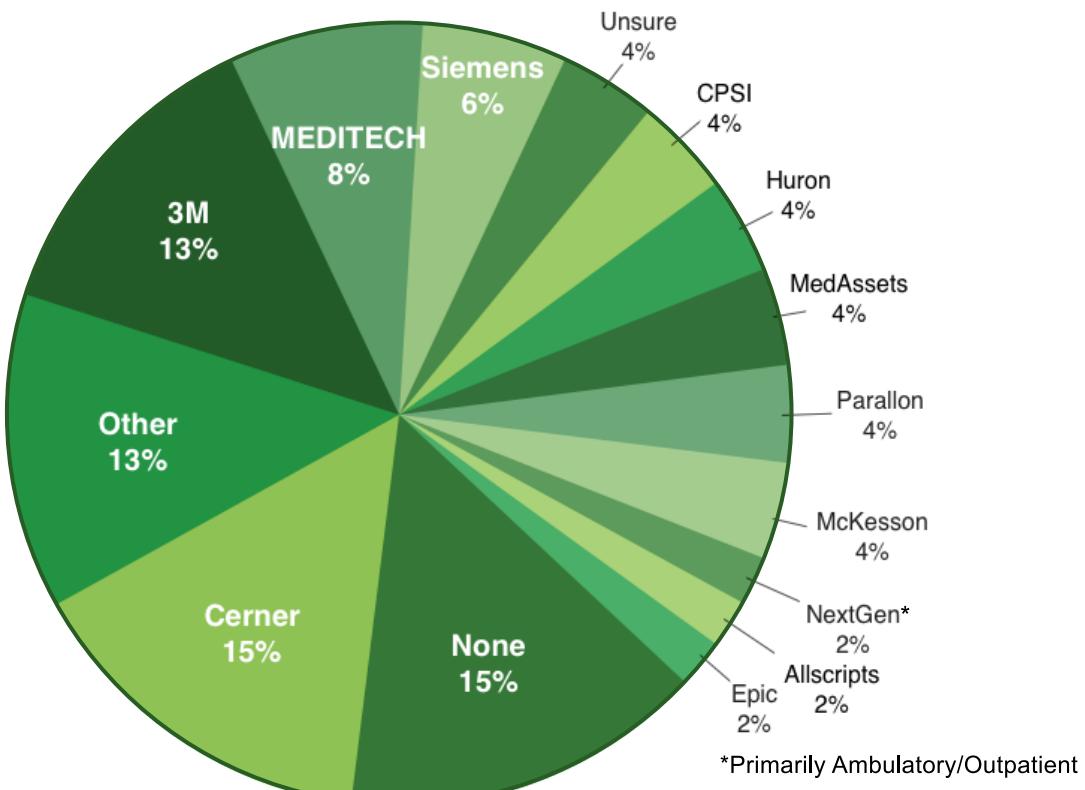


Figure 68: Revenue Cycle Management Market Share 251-500 Beds

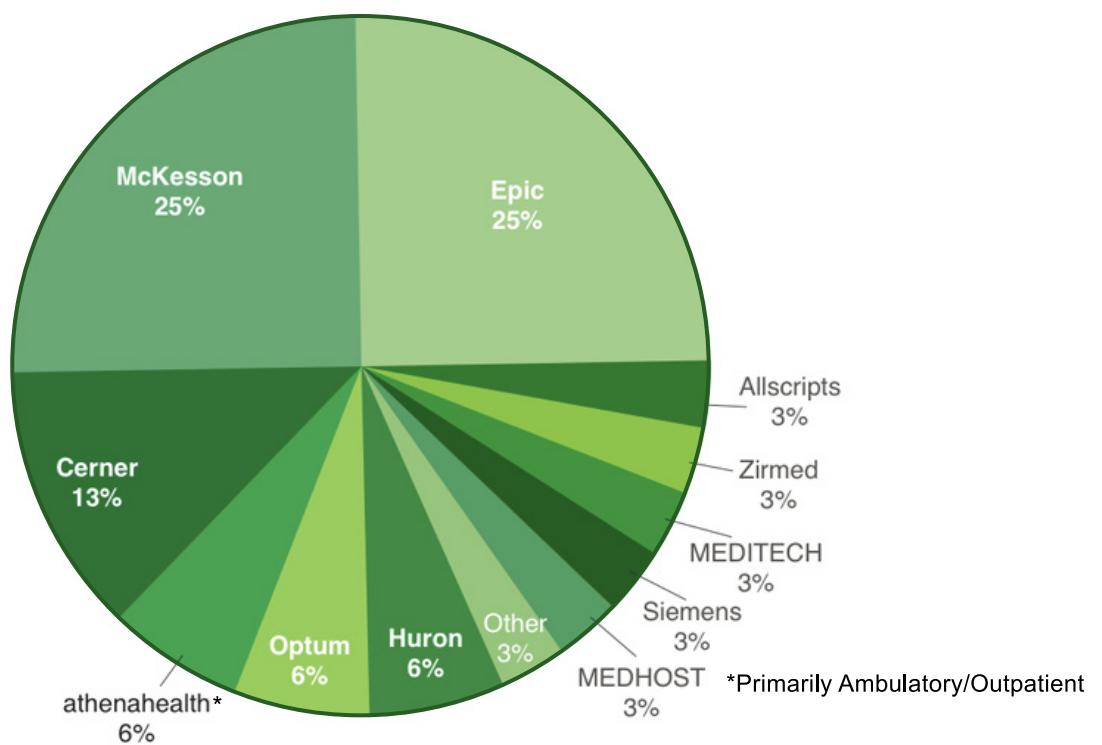


Figure 69: Revenue Cycle Management Market Share 501-1000 Beds

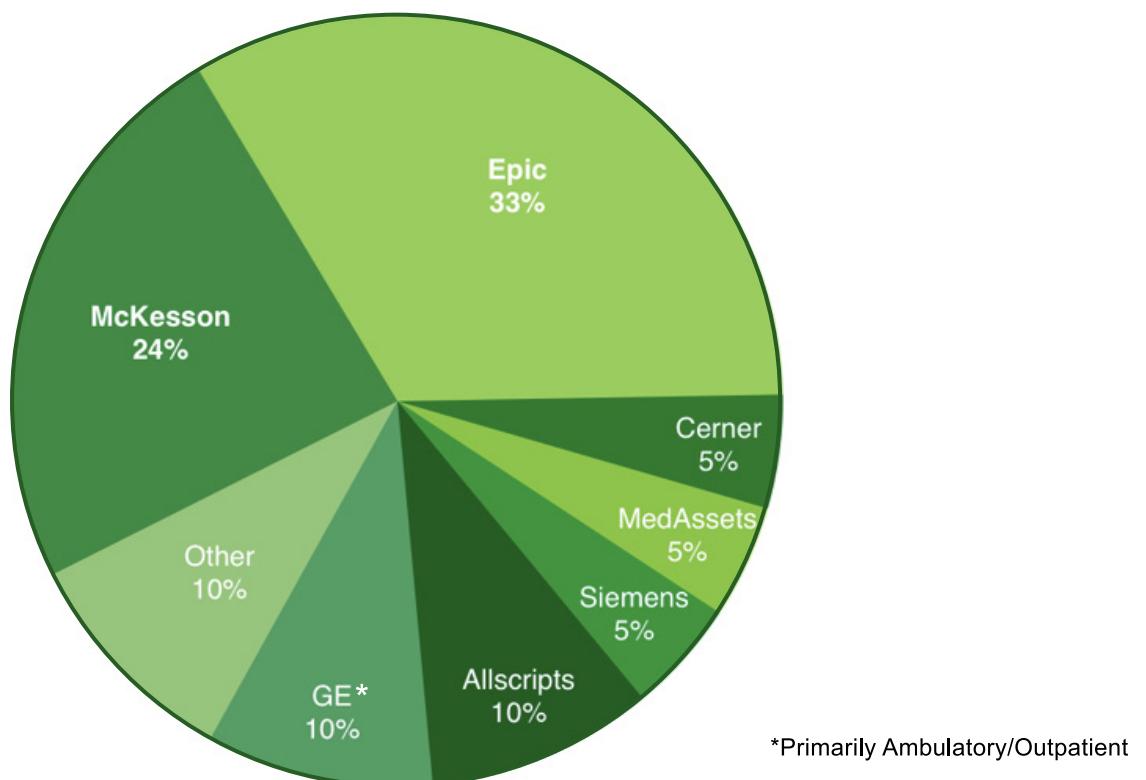
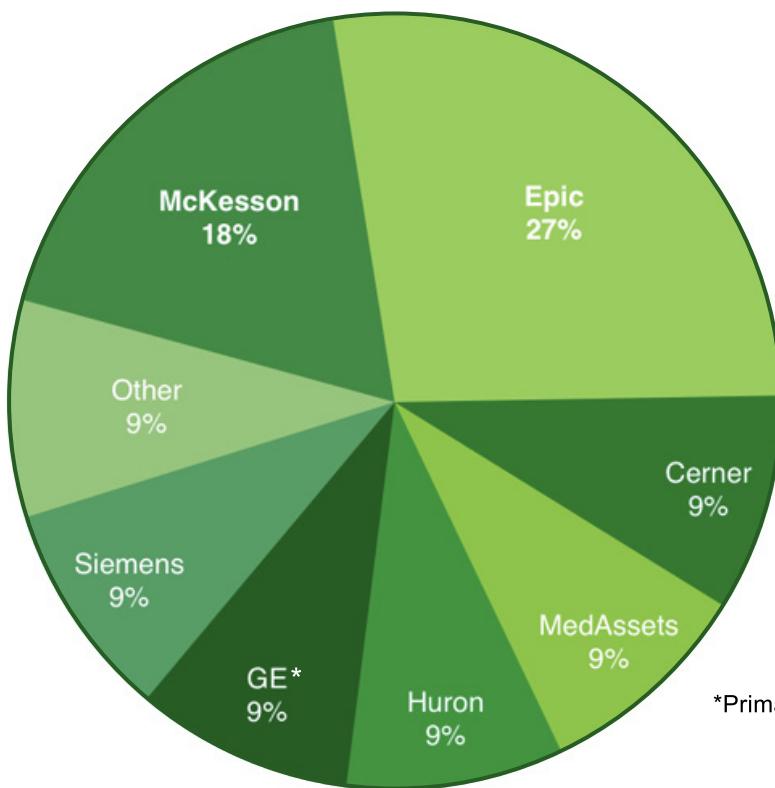


Figure 70: Revenue Cycle Management Market Share > 1000 Beds



*Primarily Ambulatory/Outpatient



MedAssets

MedAssets is one of the rare companies that seems able to appeal to a hospitals of all sizes. It maintains a portion of the market share in Revenue Cycle Management across all hospital sizes.



MedAssets' Take

Improve your revenue performance.

Current trends indicate hospitals are losing three to five percent of net revenue from inadequate revenue cycle management processes and procedures. MedAssets proven revenue cycle processes and exception-driven technologies optimize capturing the reimbursement owed for the services performed. Our full portfolio of solutions improve patient payment estimation, claims coding accuracy, contract modeling, net revenue capture, defensible pricing strategies and regulatory compliance. Sustaining revenue performance requires preparing now for significant changes in payment restructure. We help your organization prepare with specific solutions, comparative analytics and strategies to mitigate risk, identify savings opportunities and align cost to payment to help transition toward risk-based reimbursements.

RCM Mindshare

The Revenue Cycle Management market share is very fragmented but the mindshare shows a few players that are potentially poised to take large leads in 2015. Cerner, Epic and McKesson lead the way in mindshare.

- McKesson leads among hospitals with fewer than 100 beds
- Cerner leads mindshare among hospitals with 100-250 beds
- Epic leads among hospitals with more than 250 beds though Cerner competes with them among hospitals with more than 1000 beds

Figure 71: Revenue Cycle Management Mindshare

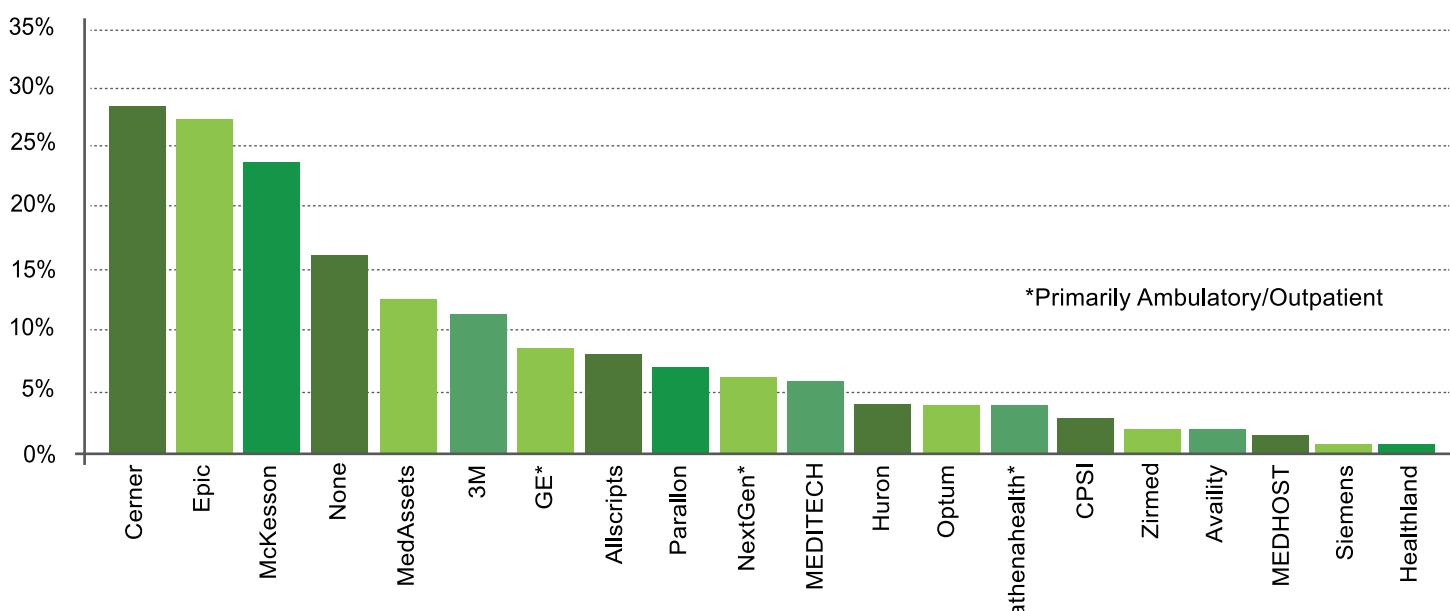
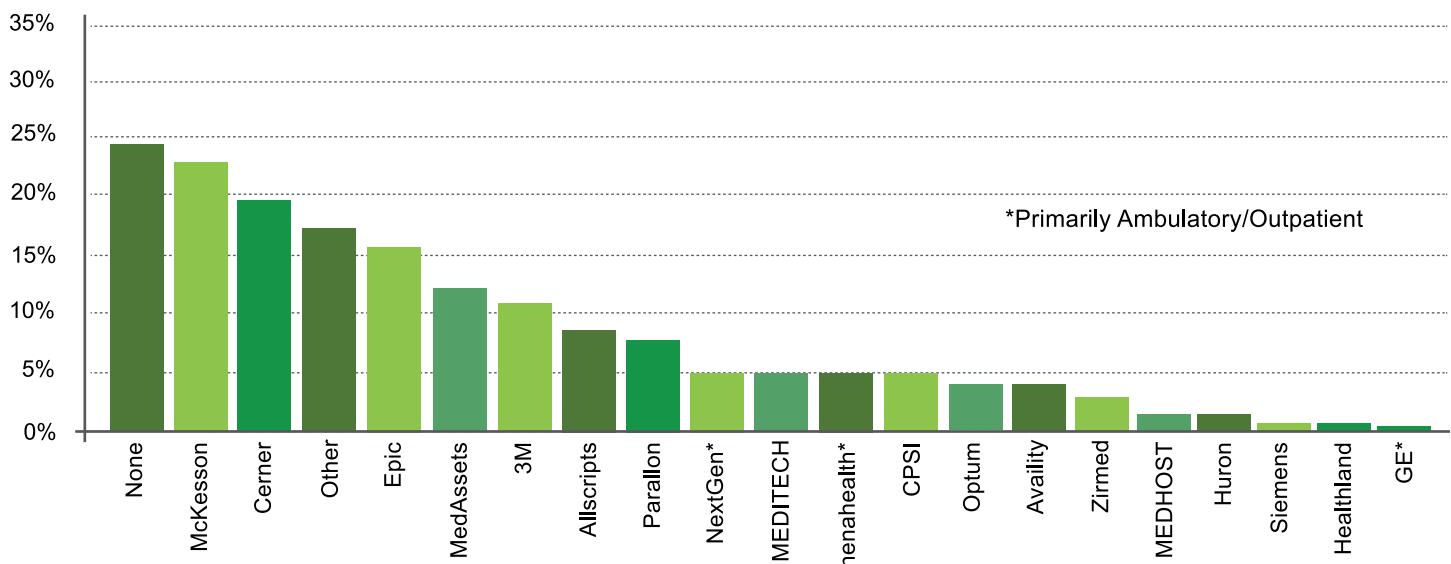
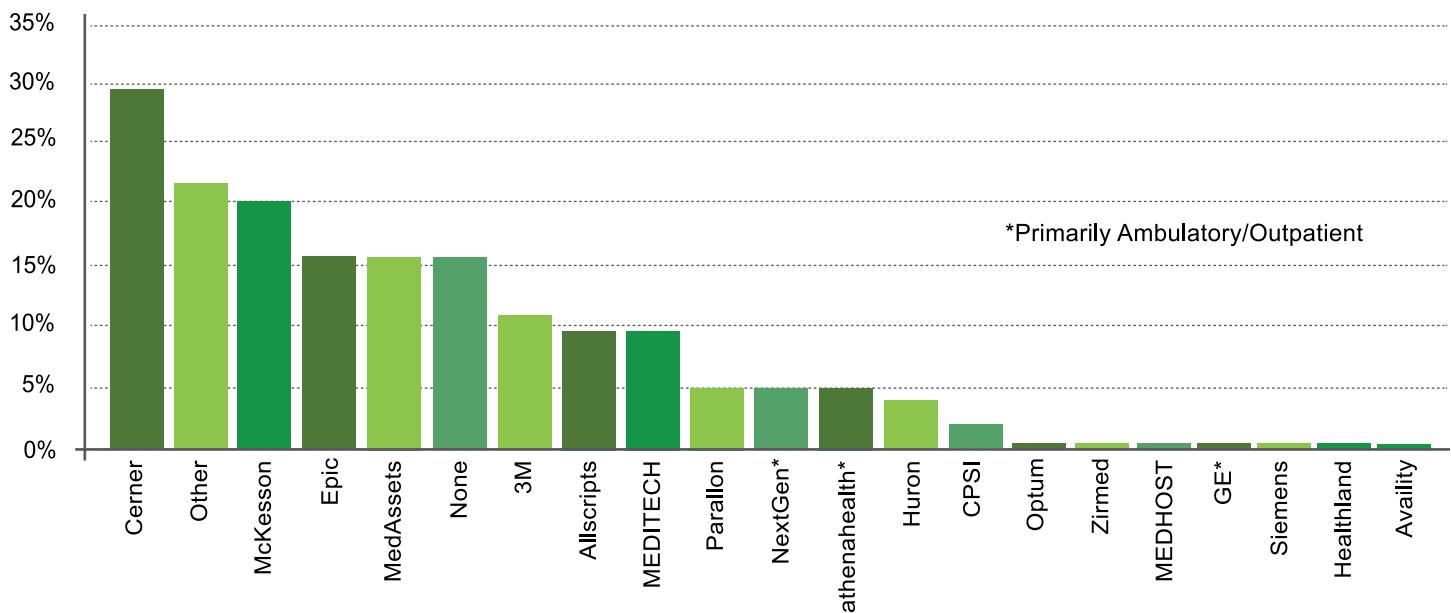


Figure 72: Revenue Cycle Management Mindshare <100 Beds



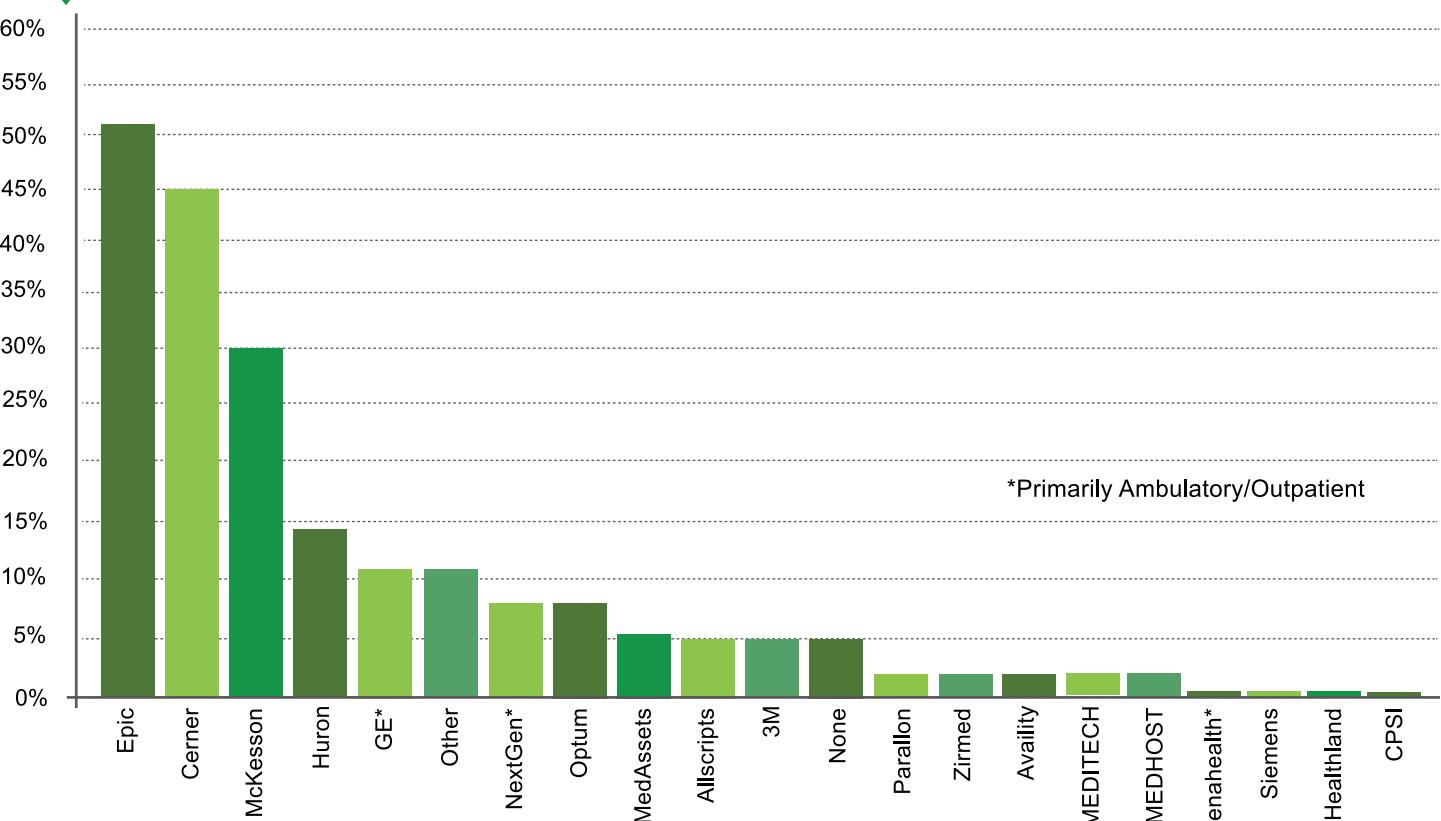
*Primarily Ambulatory/Outpatient

Figure 73: Revenue Cycle Management Mindshare 100-250 Beds



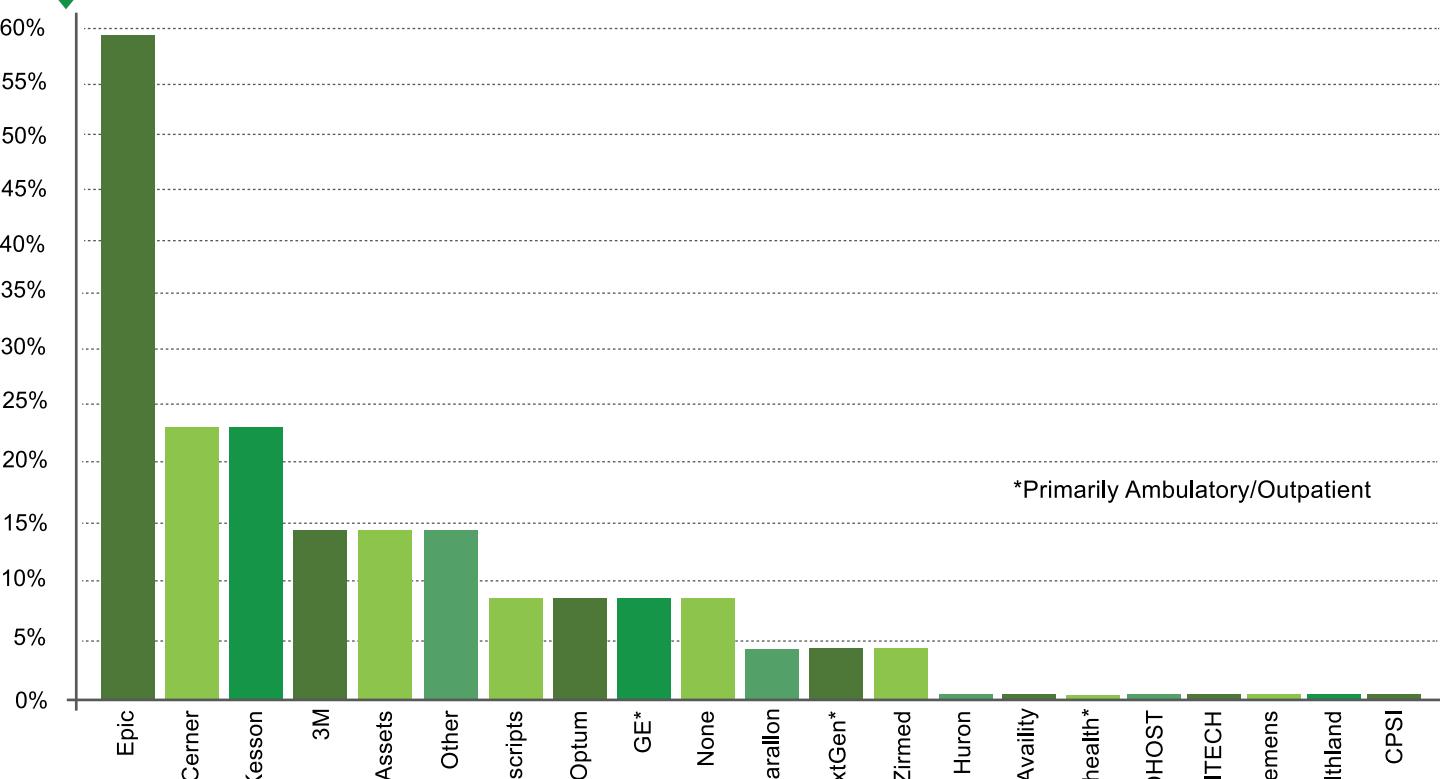
*Primarily Ambulatory/Outpatient

Figure 74: Revenue Cycle Management Mindshare 251-500 Beds



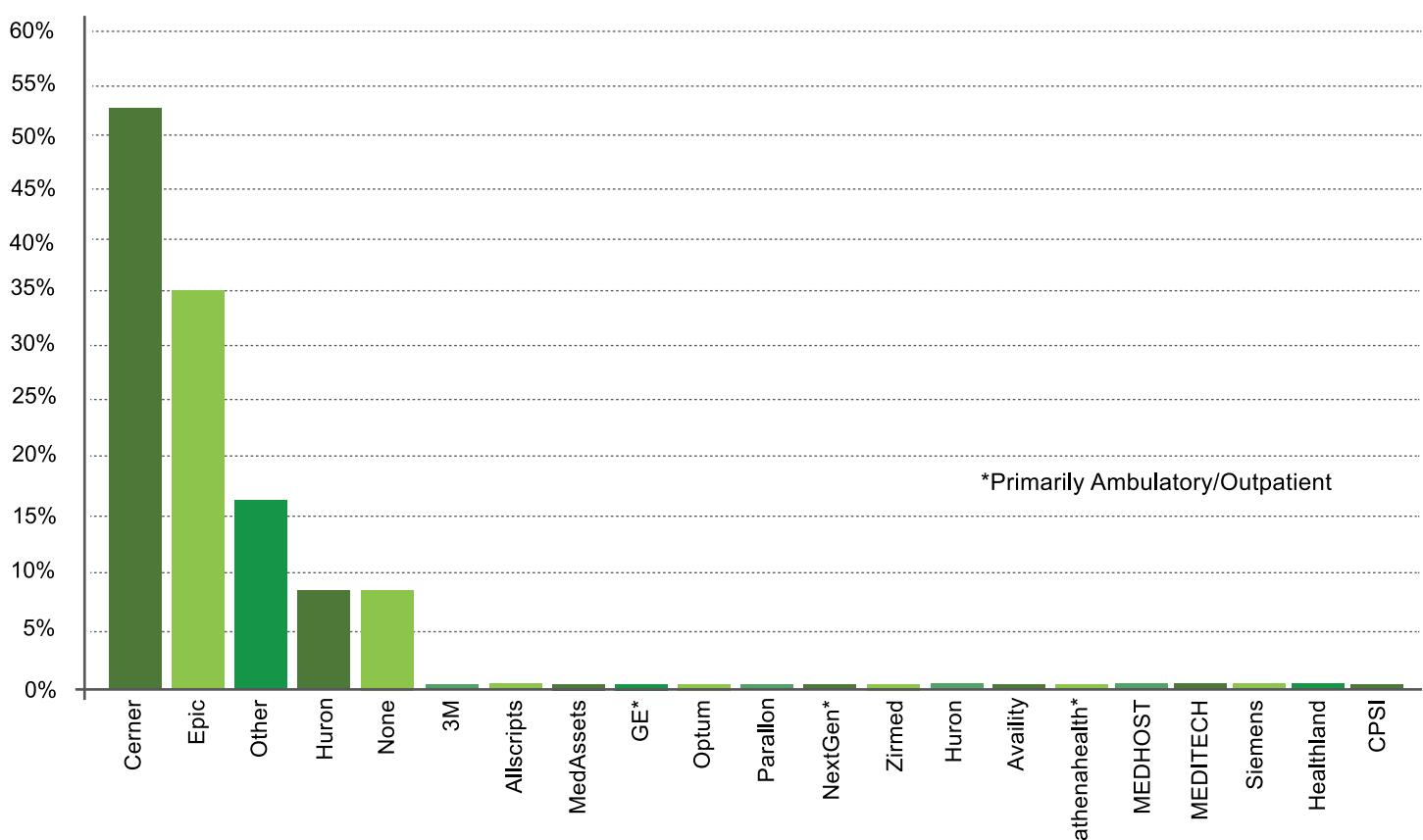
*Primarily Ambulatory/Outpatient

Figure 75: Revenue Cycle Management Mindshare 501-1000 Beds



*Primarily Ambulatory/Outpatient

Figure 76: Revenue Cycle Management Mindshare > 1000 Beds

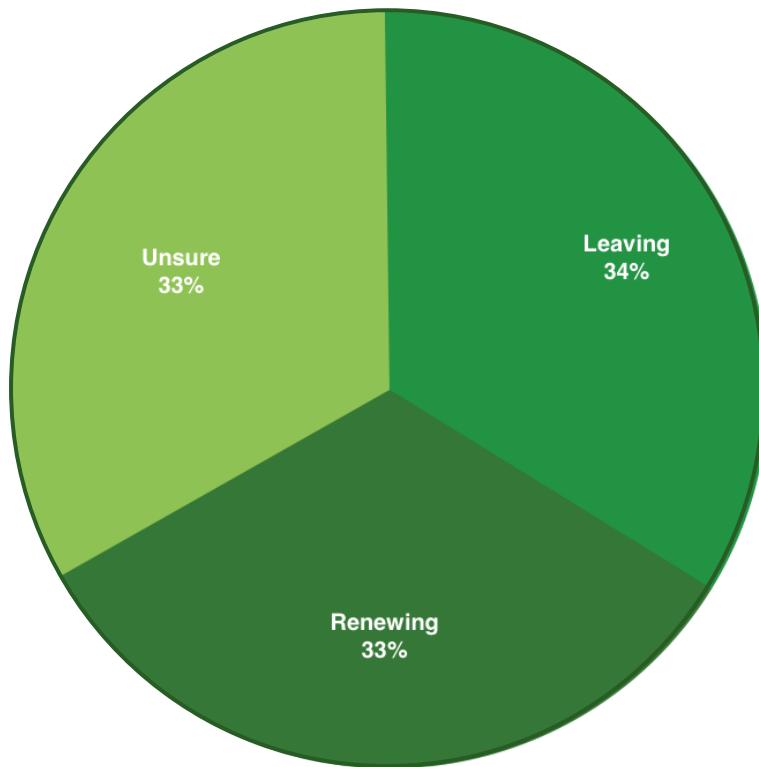


RCM Renewal

With over one third of those addressing RCM leaving their existing vendor, there is a substantial, and surprising, replacement market in RCM. The change in payment model is certainly having an impact.

Note: We do have specific renewal rates for each unique vendor, but they won't be provided in this report. peer60 would be happy to provide each vendor's renewal rate. Please contact Jeremy Bikman, jbikman@peer60.com, and he can provide that information in a phone call.

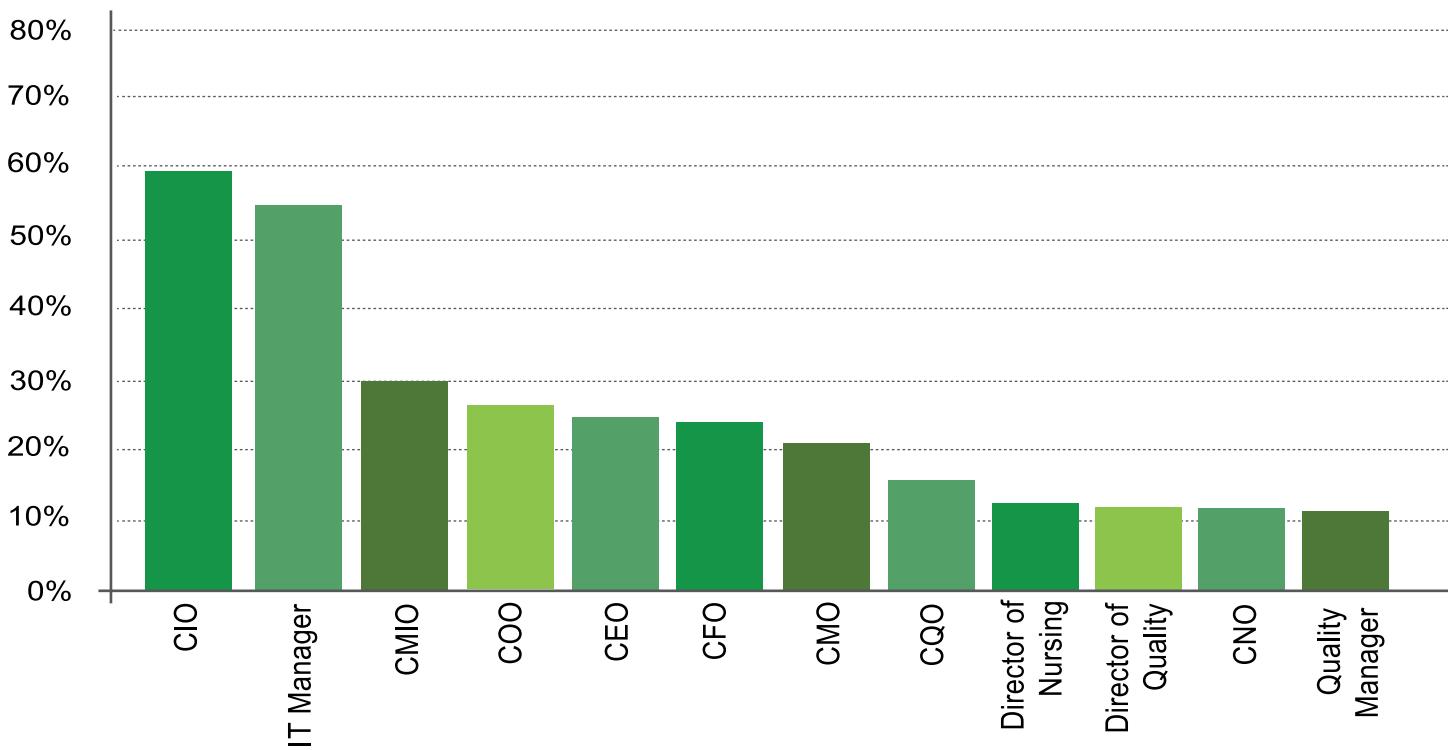
Figure 77: Revenue Cycle Management Renewal



Data Security

With identity theft on the rise and breaches costing institutions millions (and sometimes tens of millions) of dollars in fines, it isn't too surprising that healthcare providers are on the lookout for better security products. Over 24% are planning to make a purchase in 2015. Given the very serious impacts that data security breaches have had, we're a little surprised that this category isn't getting significantly more attention. Maybe a little more pain will spur more action.

Figure 78: Data Security Purchase Intention by Role



Data Security Market Share

The data security market currently has a few major power players and a lot of smaller contenders. There doesn't seem to be a vendor that is specifically dedicated to healthcare data security. One would think this will change sometime soon.

- Cisco is the largest vendor for hospitals with up to 500 beds
- McAfee leads among hospitals with 501-1000 beds
- VMware pulls into a tie with Cisco for hospitals with 501-1000 beds
- Most hospital executives at the largest facilities are unsure who they are currently using for data security

Figure 79: Data Security Market Share

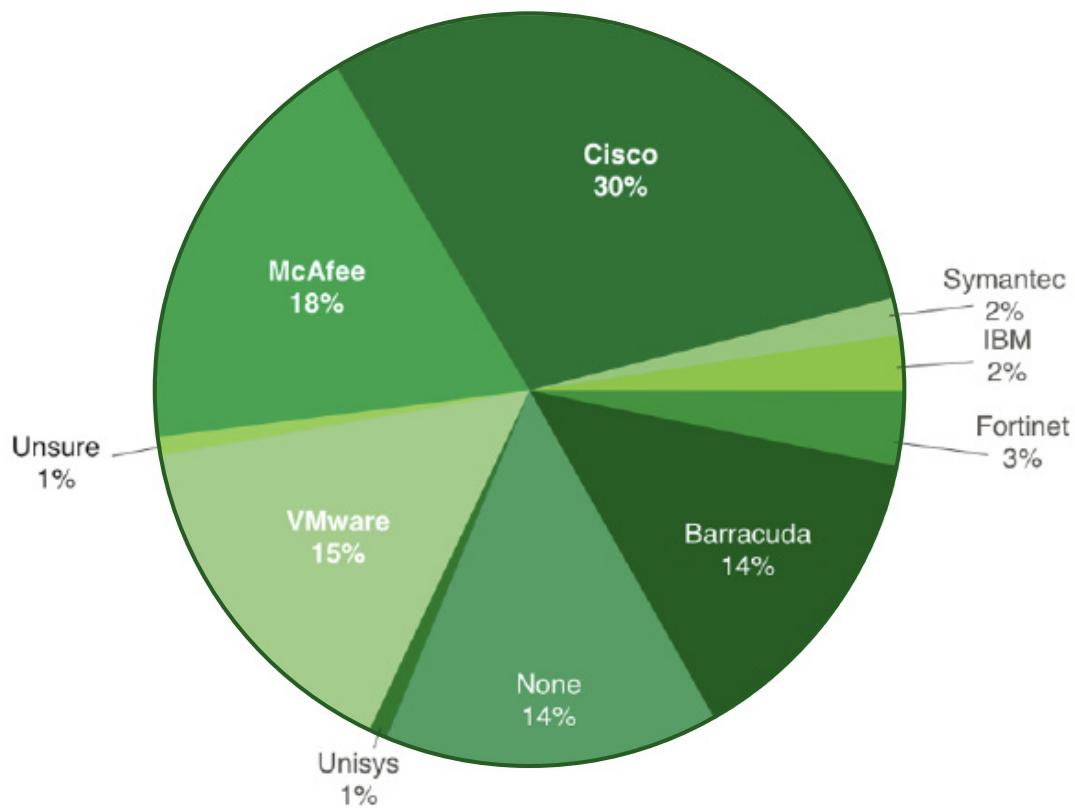


Figure 80: Data Security Market Share < 100 Beds

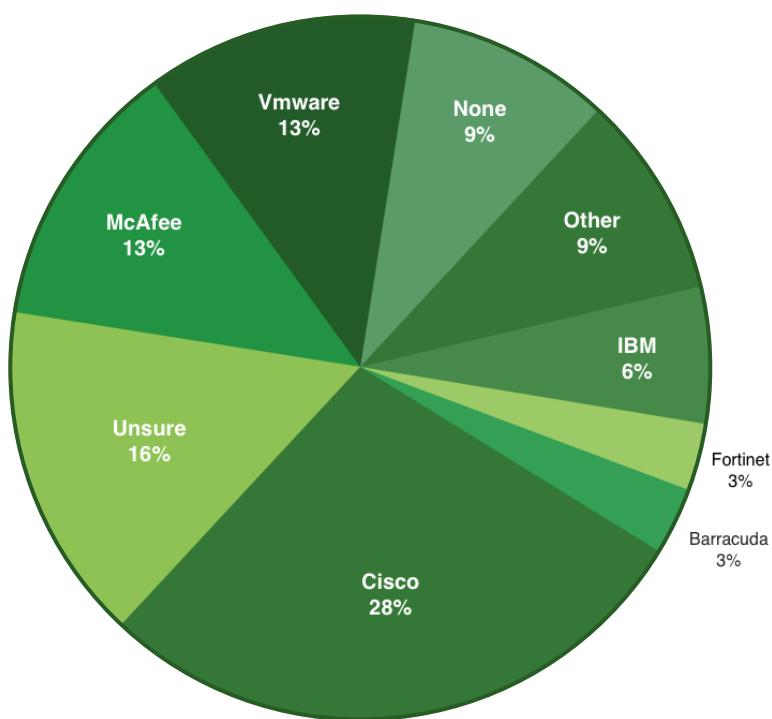


Figure 81: Data Security Market Share 100-250 Beds

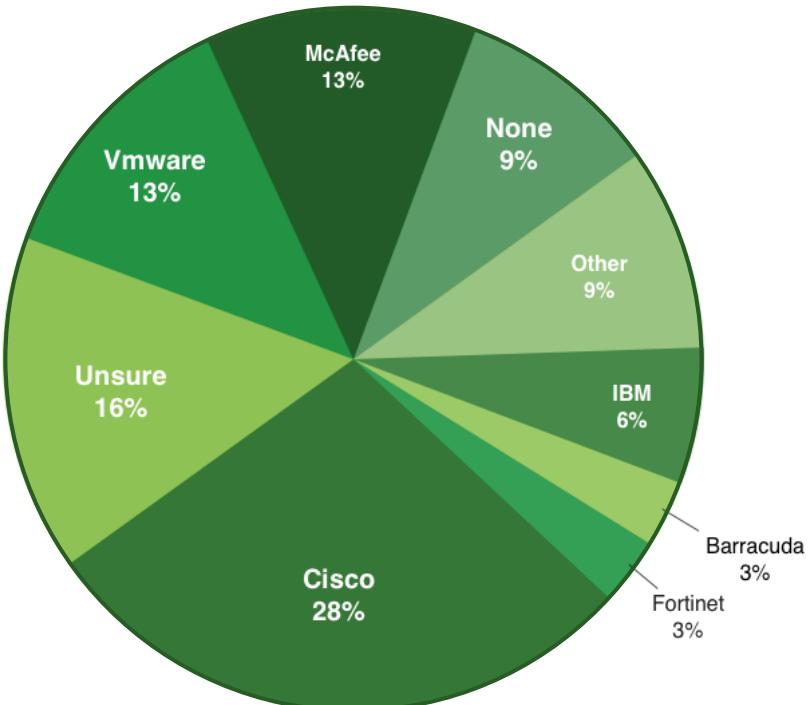


Figure 82: Data Security Market Share 251-500 Beds

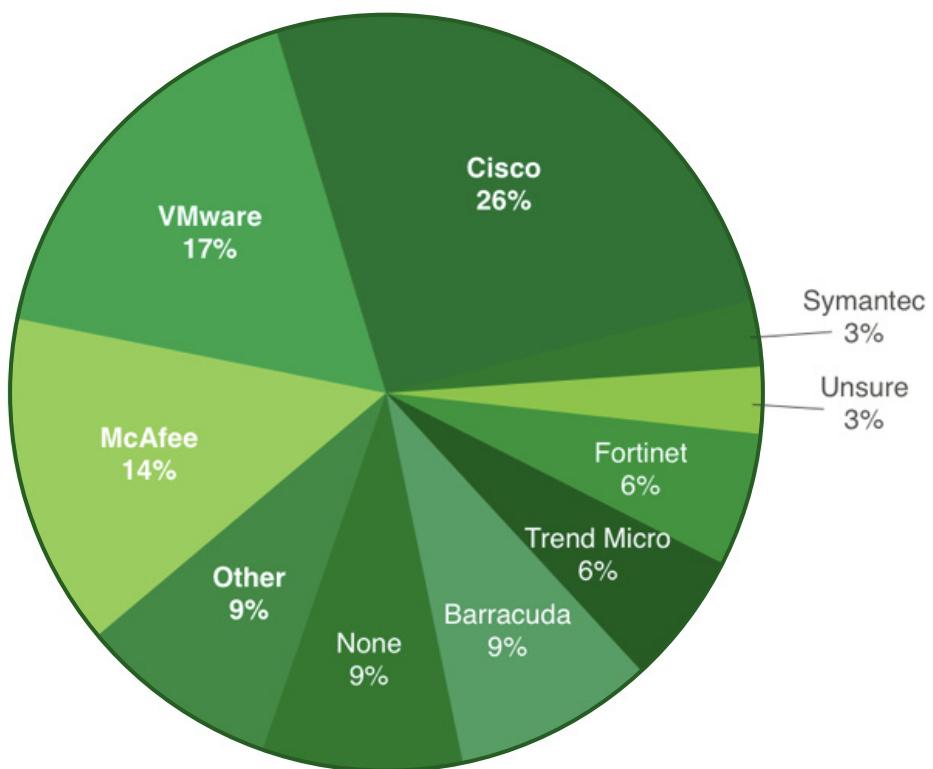


Figure 83: Data Security Market Share 501-1000 Beds

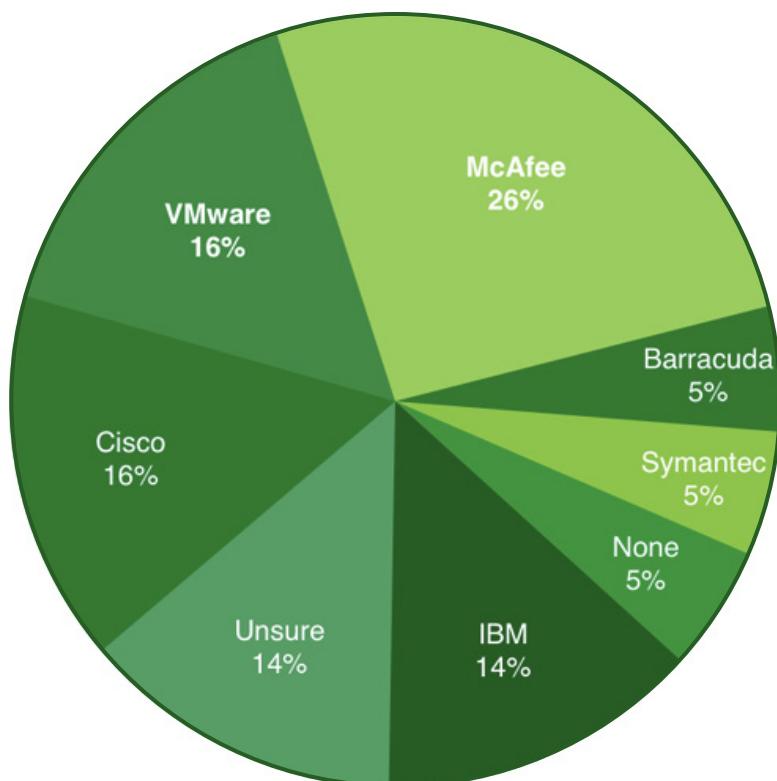
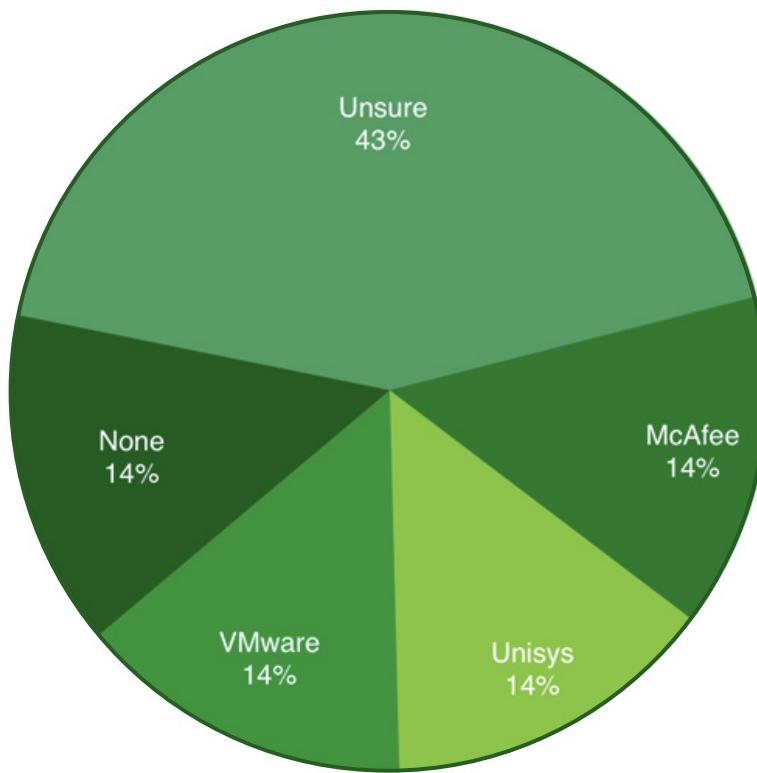


Figure 84: Data Security Market Share > 1000 Beds



Data Security Mindshare

Cisco, at the moment, is way out front in mindshare with McAfee, VMware and Barracuda poised within striking distance to make some serious inroads into healthcare:

- Cisco leads mindshare among hospitals with up to 500 beds
- McAfee pulls into a tie with Cisco for the lead among hospitals with 501-1000 beds
- McAfee leads mindshare among the largest hospitals

Figure 85: Data Security Mindshare

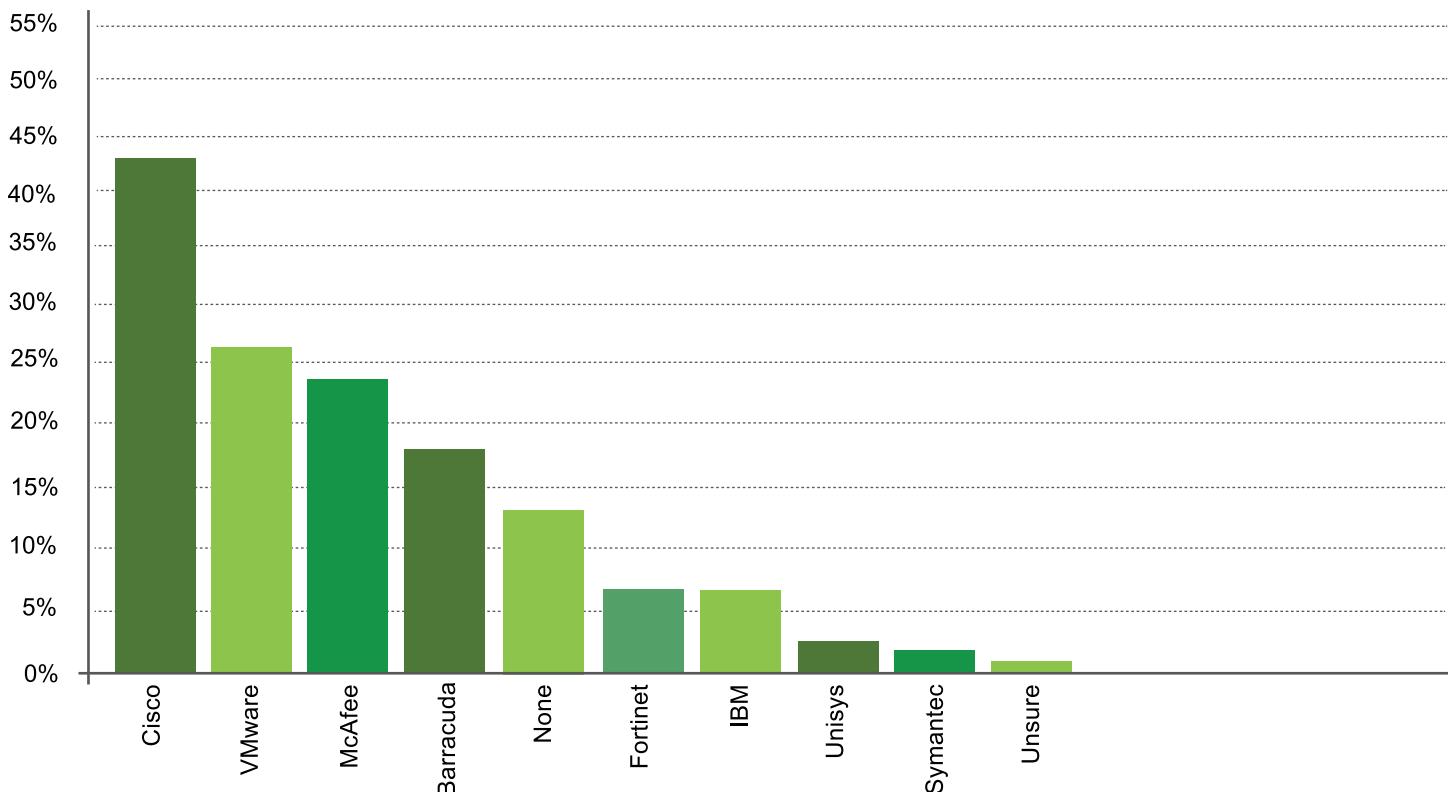


Figure 86: Data Security Mindshare < 100 Beds

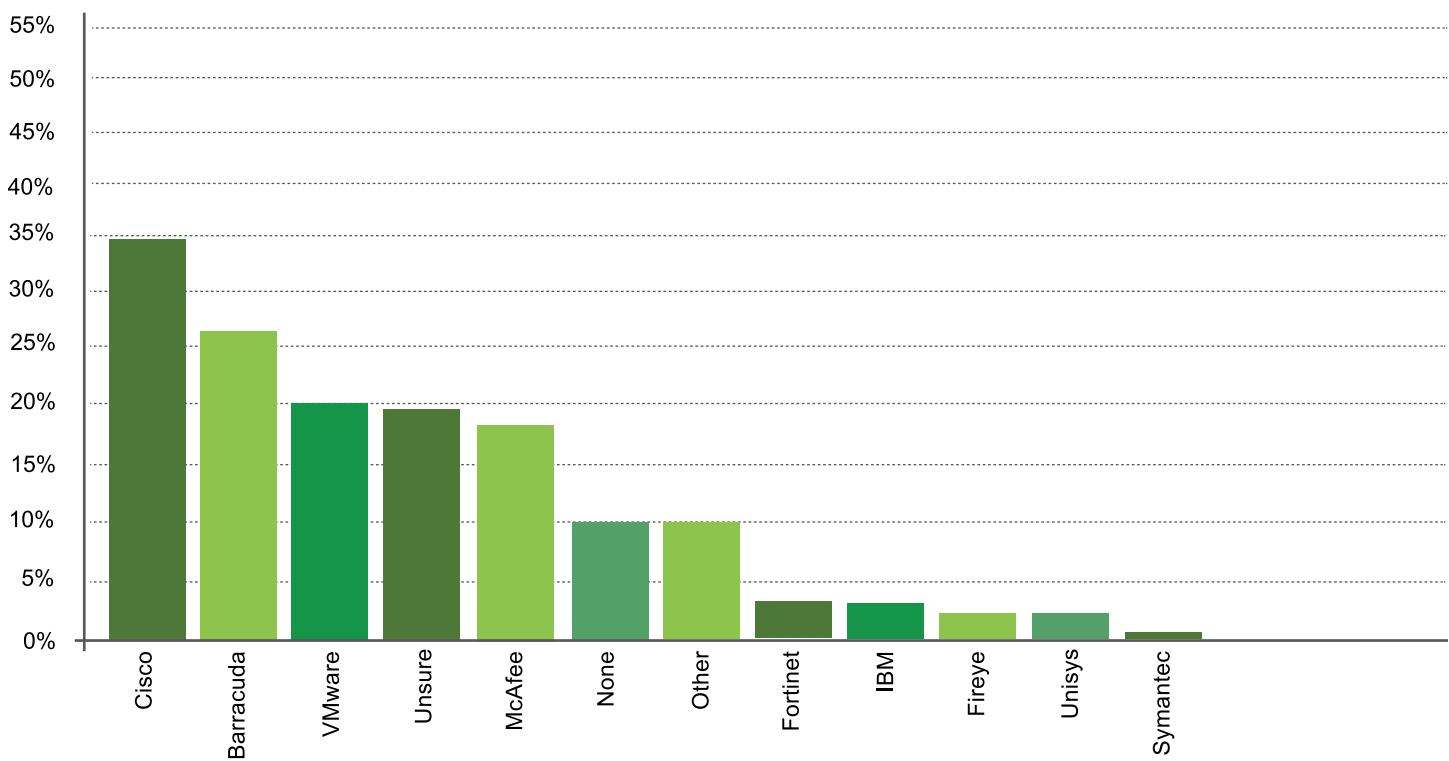


Figure 87: Data Security Mindshare 100-250 Beds

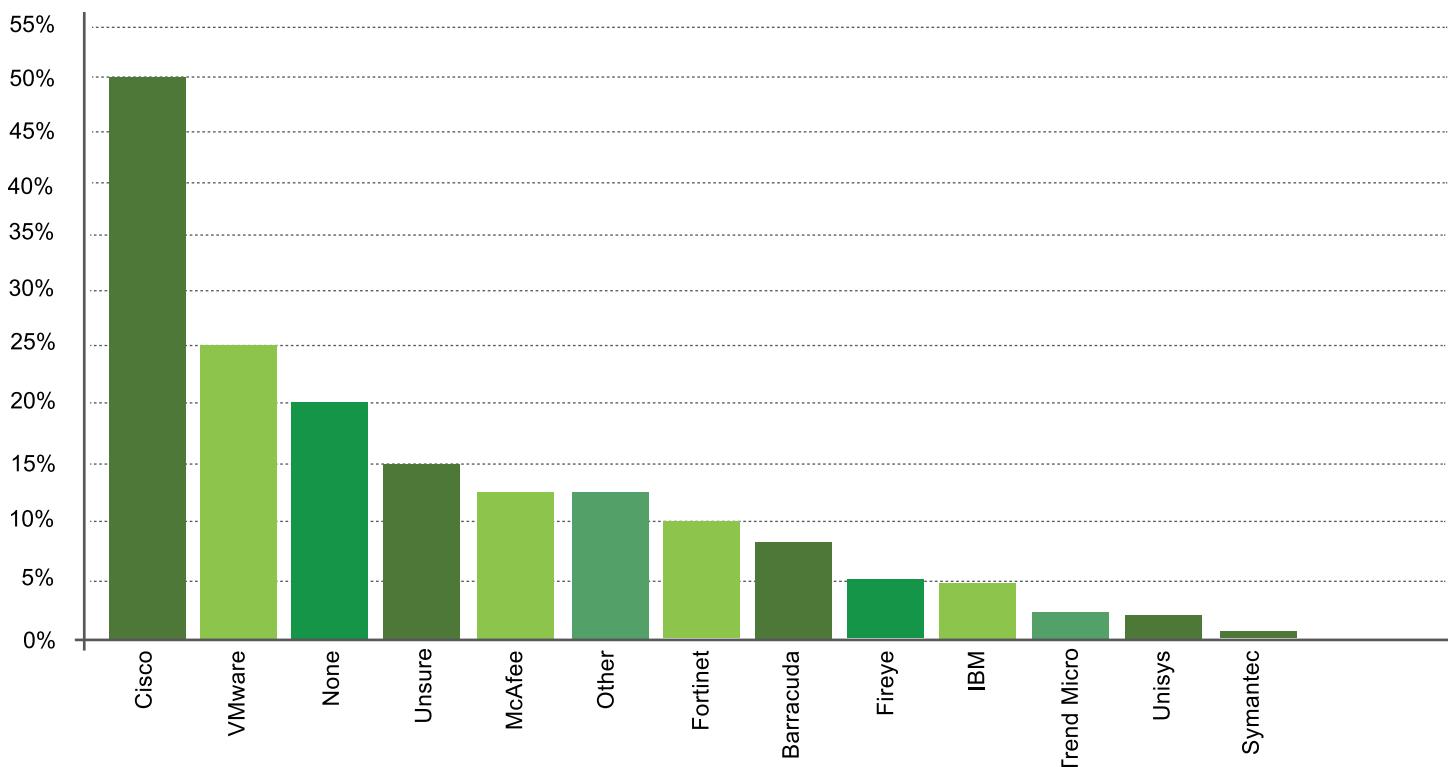


Figure 88: Data Security Mindshare 251-500 Beds

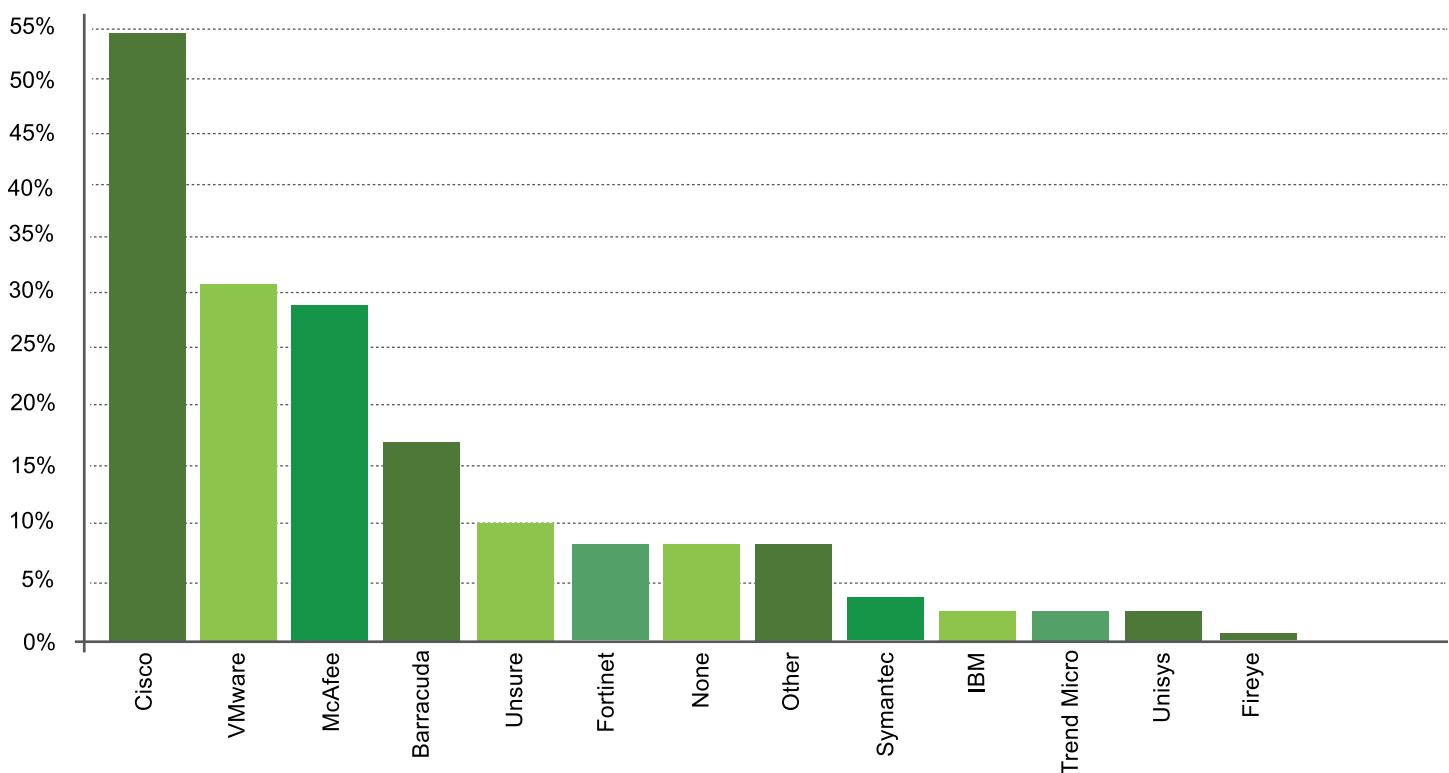


Figure 89: Data Security Mindshare 501-1000 Beds

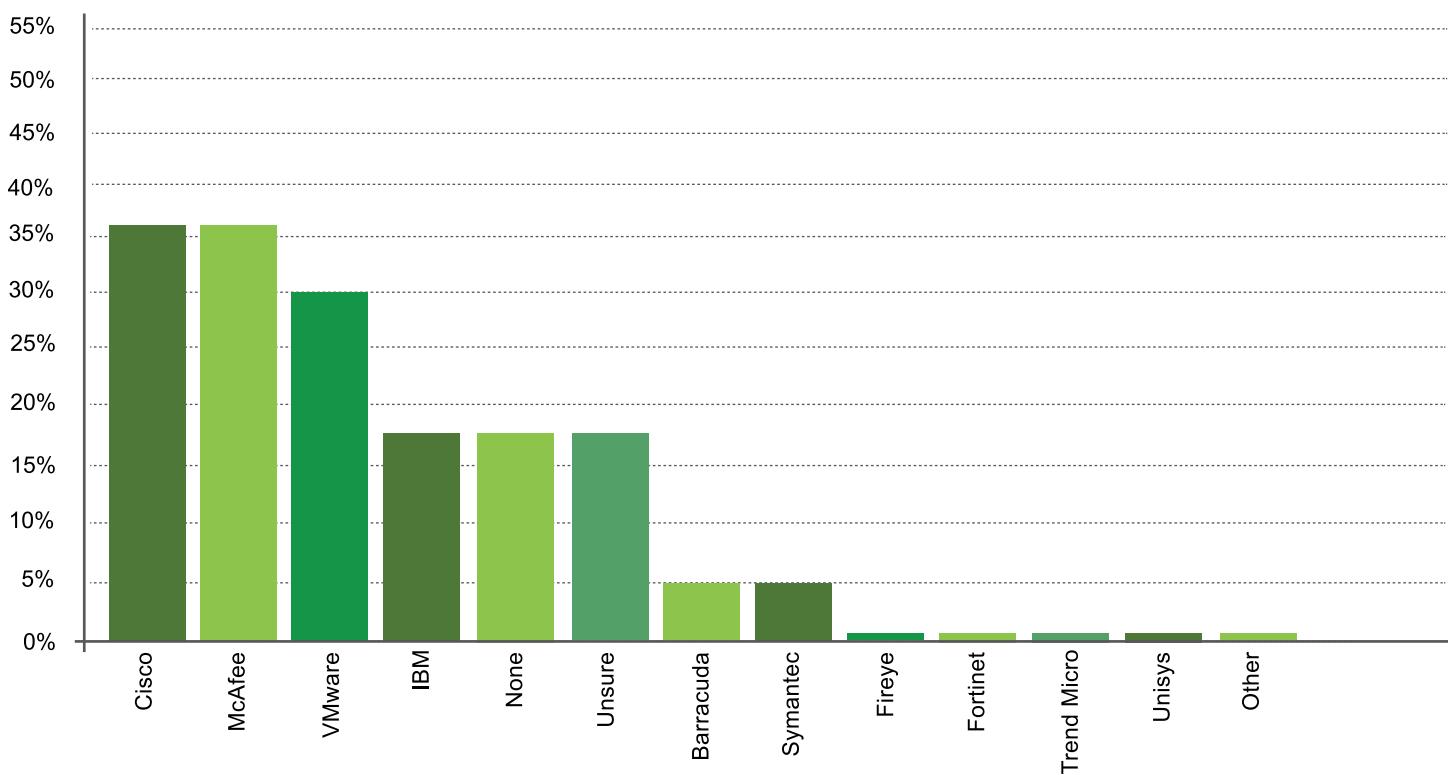
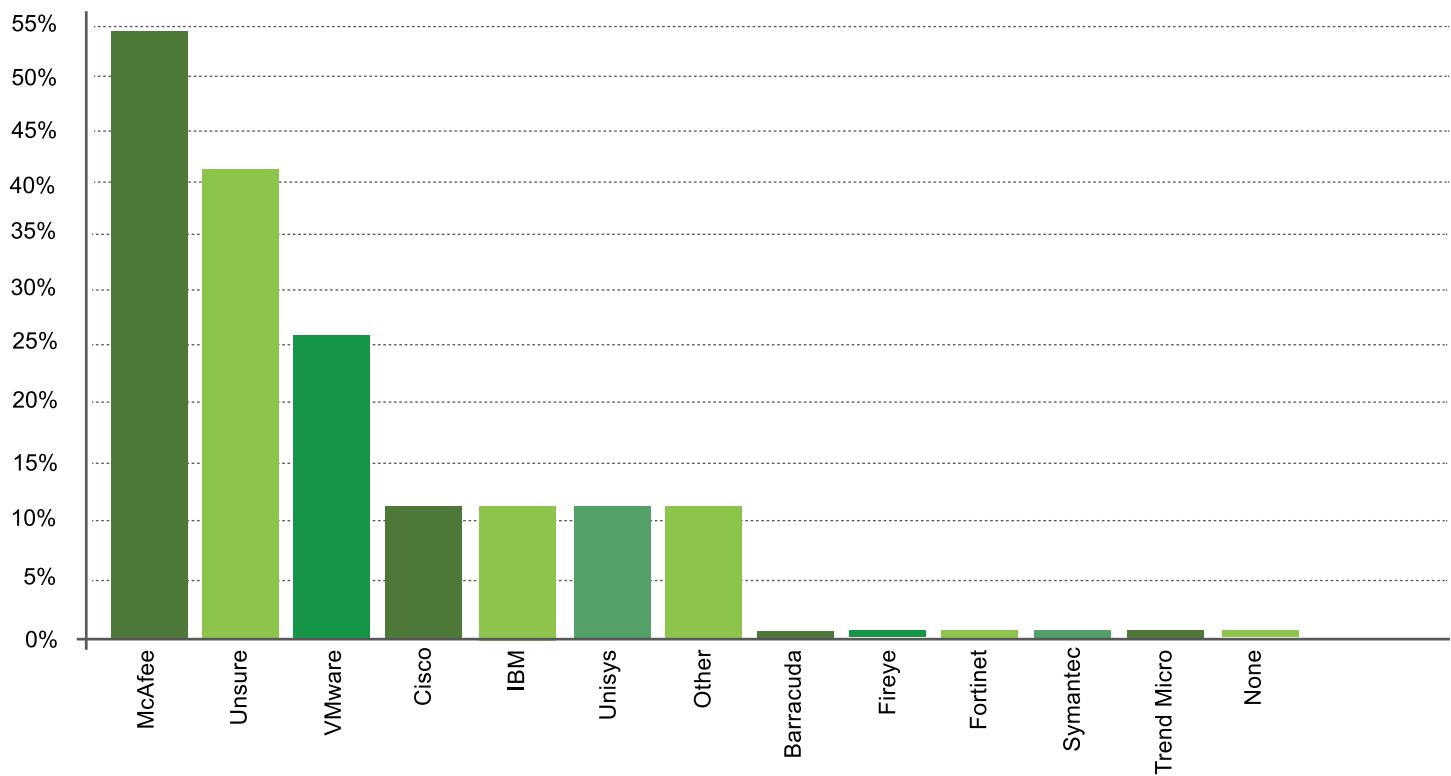


Figure 90: Data Security Mindshare > 1000 Beds

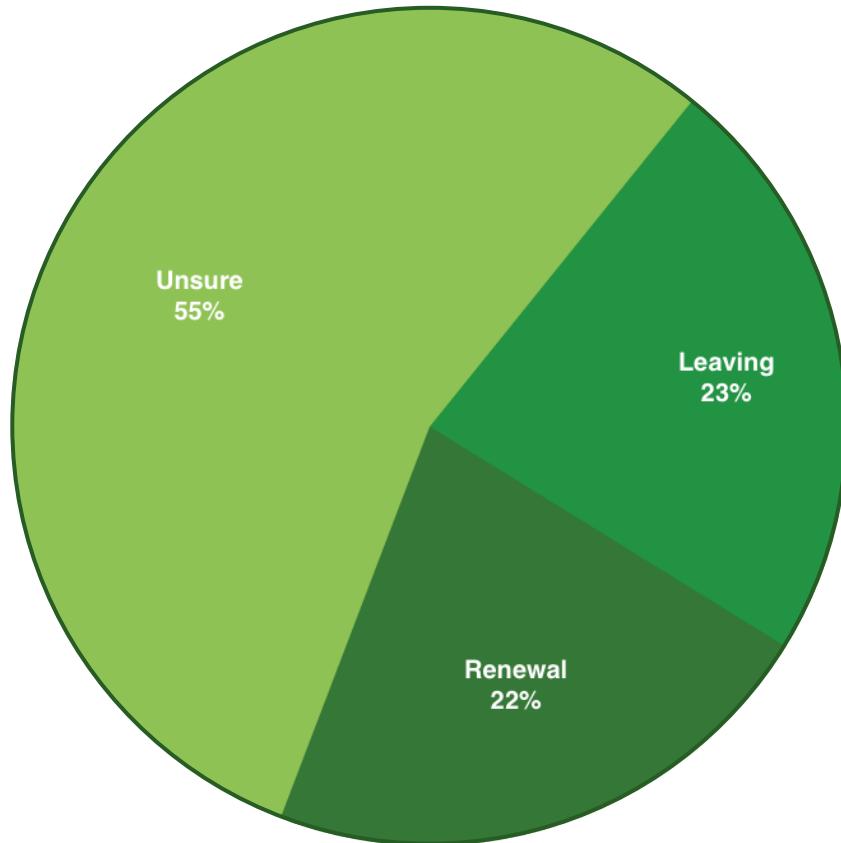


Data Security Renewal

Only 22% of hospital leaders are definitely renewing their existing product, which means there is an incredibly large replacement market in the world of data security. Simply put, this segment is still completely, and utterly, wide open for all comers.

Note: We do have specific renewal rates for each unique vendor, but they won't be provided in this report. peer60 would be happy to provide each vendor's renewal rate. Please contact Jeremy Bikman, jbikman@peer60.com, and he can provide that information in a phone call.

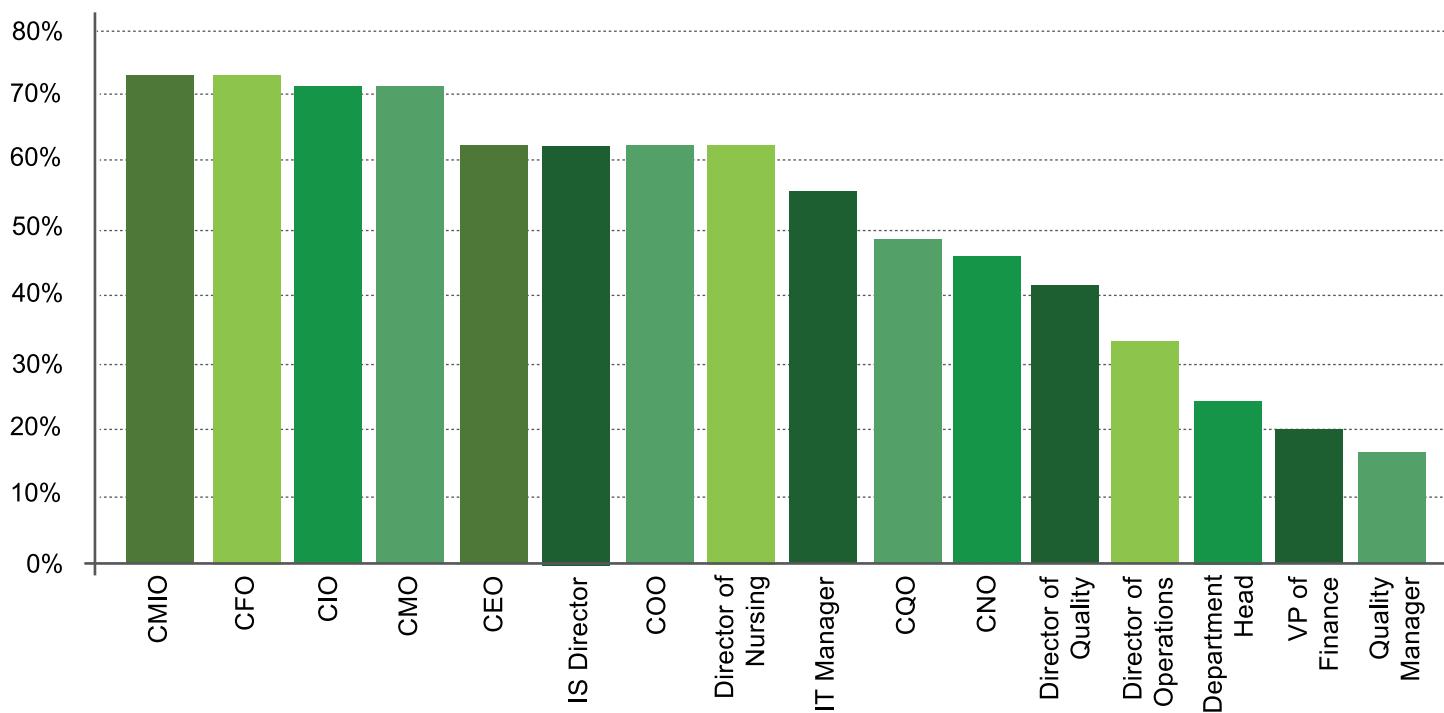
Figure 91: Data Security Renewal



ICD-10 Migration

Over 58% of hospital leaders said their organization plans to address ICD-10 in 2015. Given the impacts this migration will have on hospital operations and fiscal health, this isn't very surprising. This was the highest percentage brought up by hospital leaders; however, the numbers get even higher, and more interesting, depending on the role.

Figure 92: ICD-10 Migration Purchase Intention by Role



Over 70% of CMOs, CIOs, CFOs, and CMIOs each said they planned to address ICD-10 during the next year. While only 58% of all hospital leaders said they were looking at ICD-10, these responses from C-level executives indicate that the number is probably even higher.

ICD-10 Migration Market Share

3M holds the largest market share among a very fragmented ICD-10 market. Many companies attempt to compete for hospitals of specific sizes.

- Other, None, and Unsure account for 55% of the market share
- 3M leads overall market share thanks to its lead among hospitals with fewer than 500 beds
- Optum pulls into a tie with 3M in market share for hospitals with 501-1000 beds
- Epic and McKesson lead market share among hospitals with more than 1000 beds

Figure 93: ICD-10 Migration Market Share

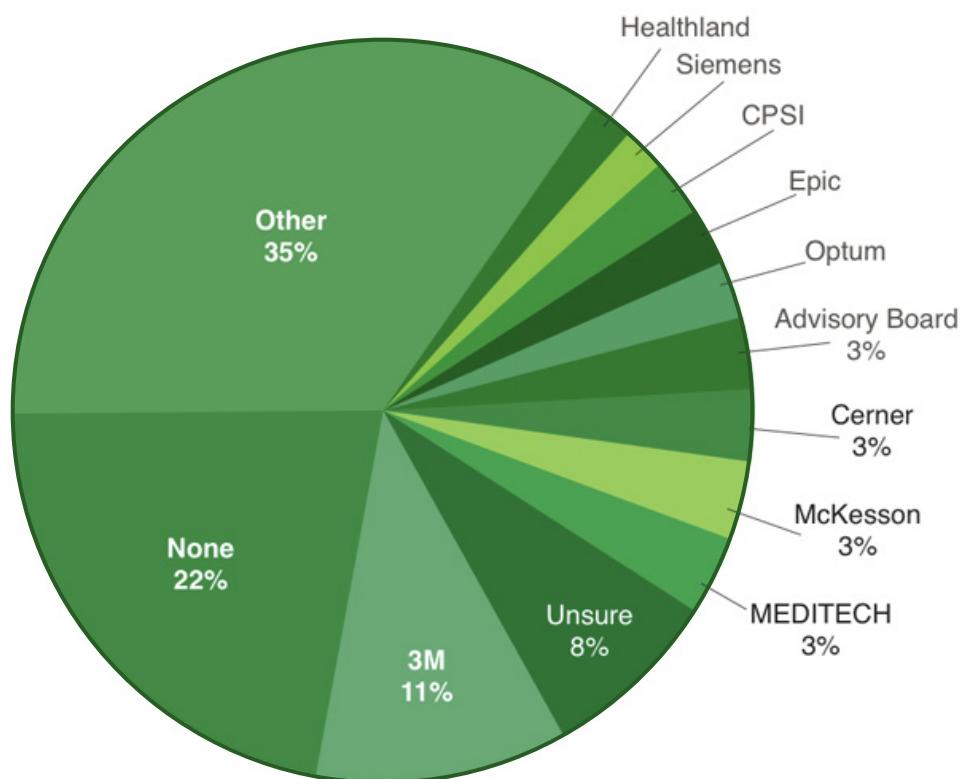


Figure 94: ICD-10 Migration Market Share < 100 Beds

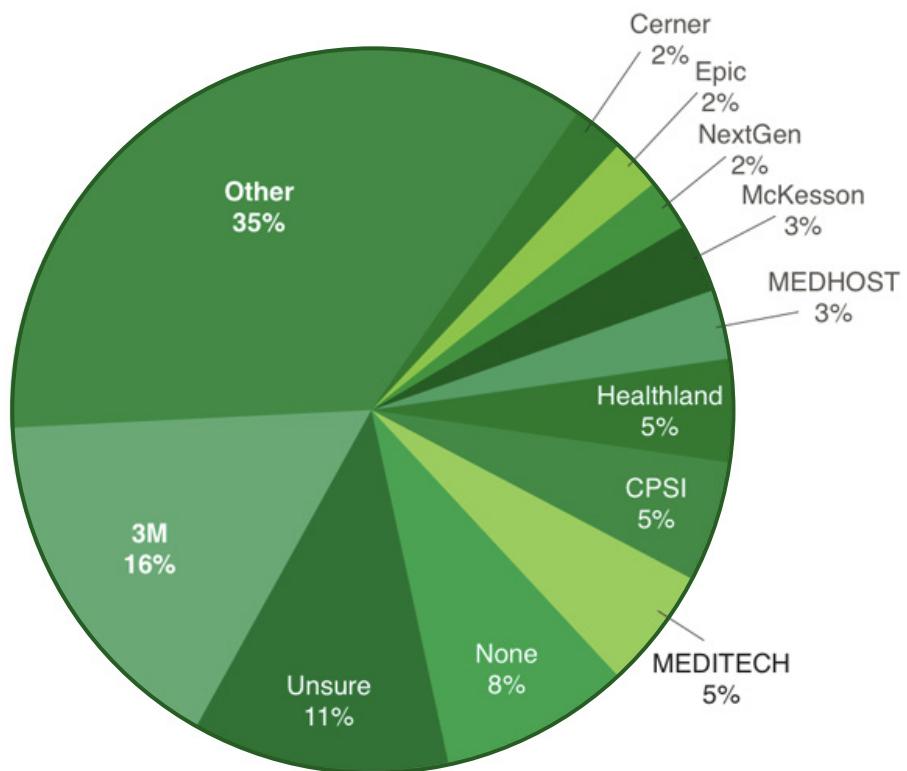


Figure 95: ICD-10 Migration Market Share 100-250 Beds

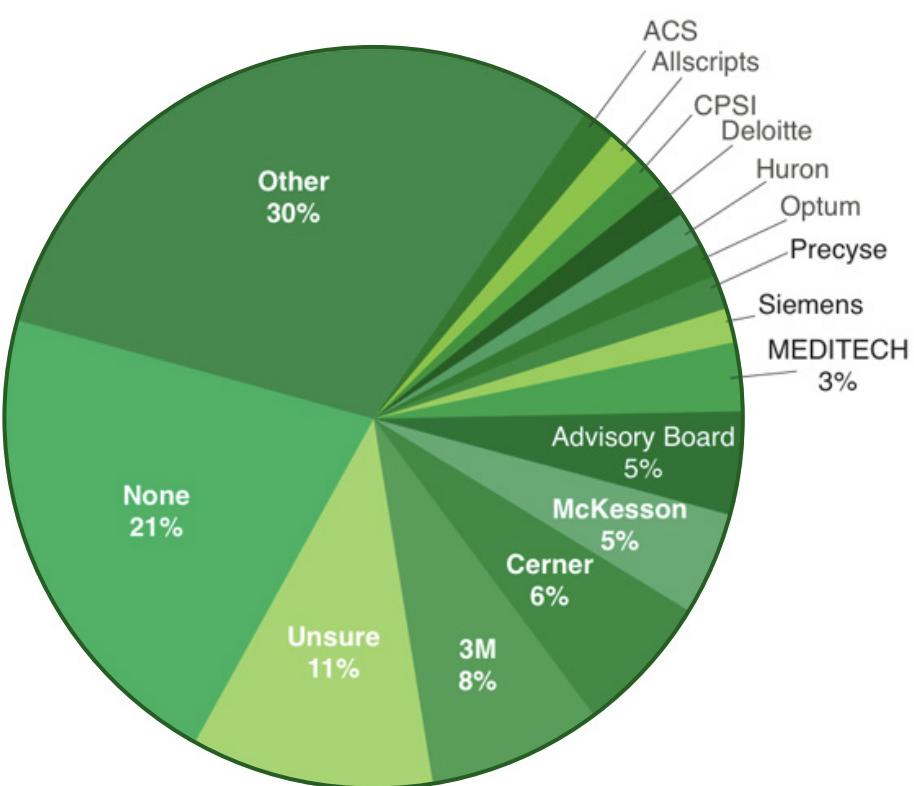


Figure 96: ICD-10 Migration Market Share 251-500 Beds

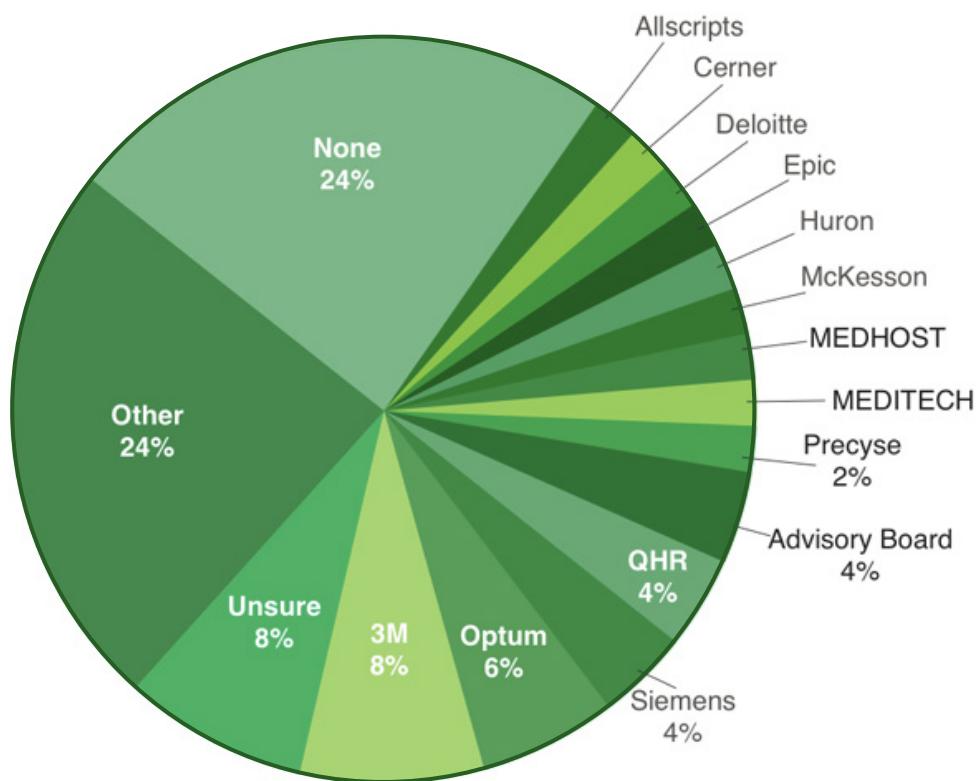


Figure 97: ICD-10 Migration Market Share 501-1000 Beds

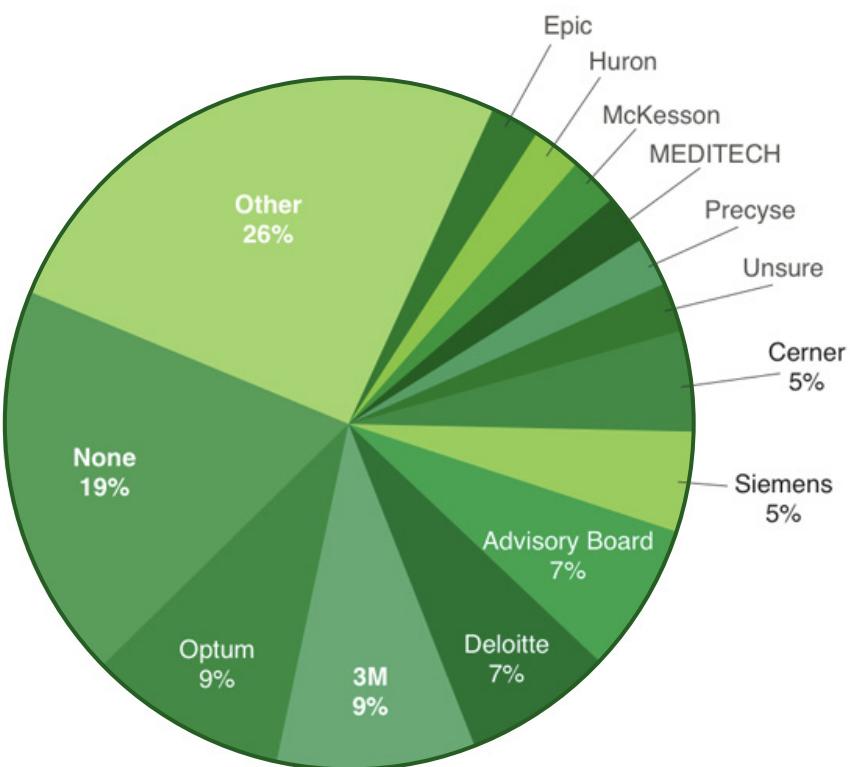
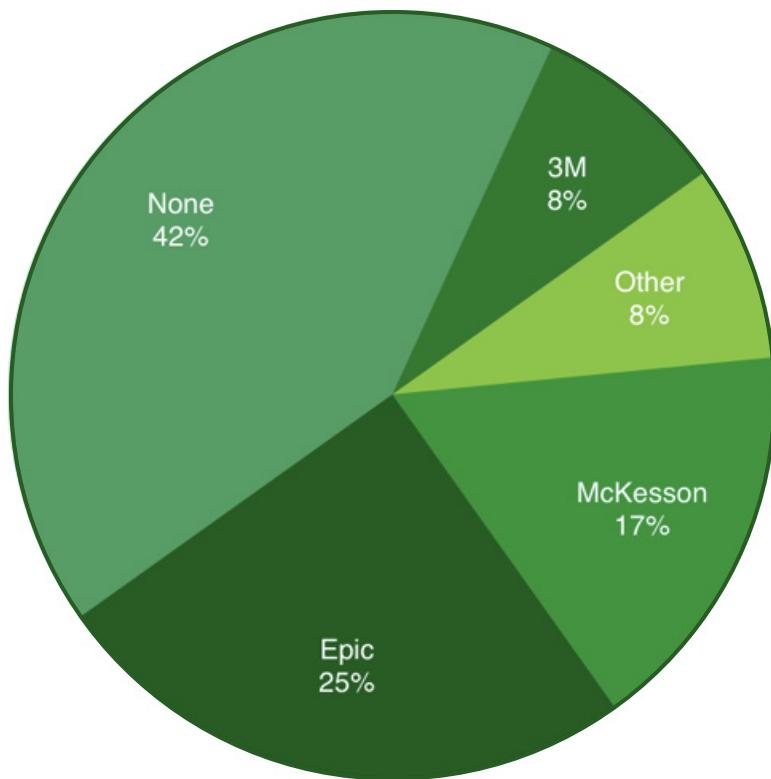


Figure 98: ICD-10 Migration Market Share > 1000 Beds



ICD-10 Migration Mindshare

The mindshare of ICD-10 looks a lot like its market share. Marketers will be excited by the potential to persuade over 60% of facilities who don't even know who they will work with:

- Other firms, which are usually small consulting groups, are getting the majority of mindshare
- Many facilities have no idea who they will work with, meaning there is an opening for many firms to jump in
- 3M leads mindshare among established firms

Figure 99: ICD-10 Migration Mindshare

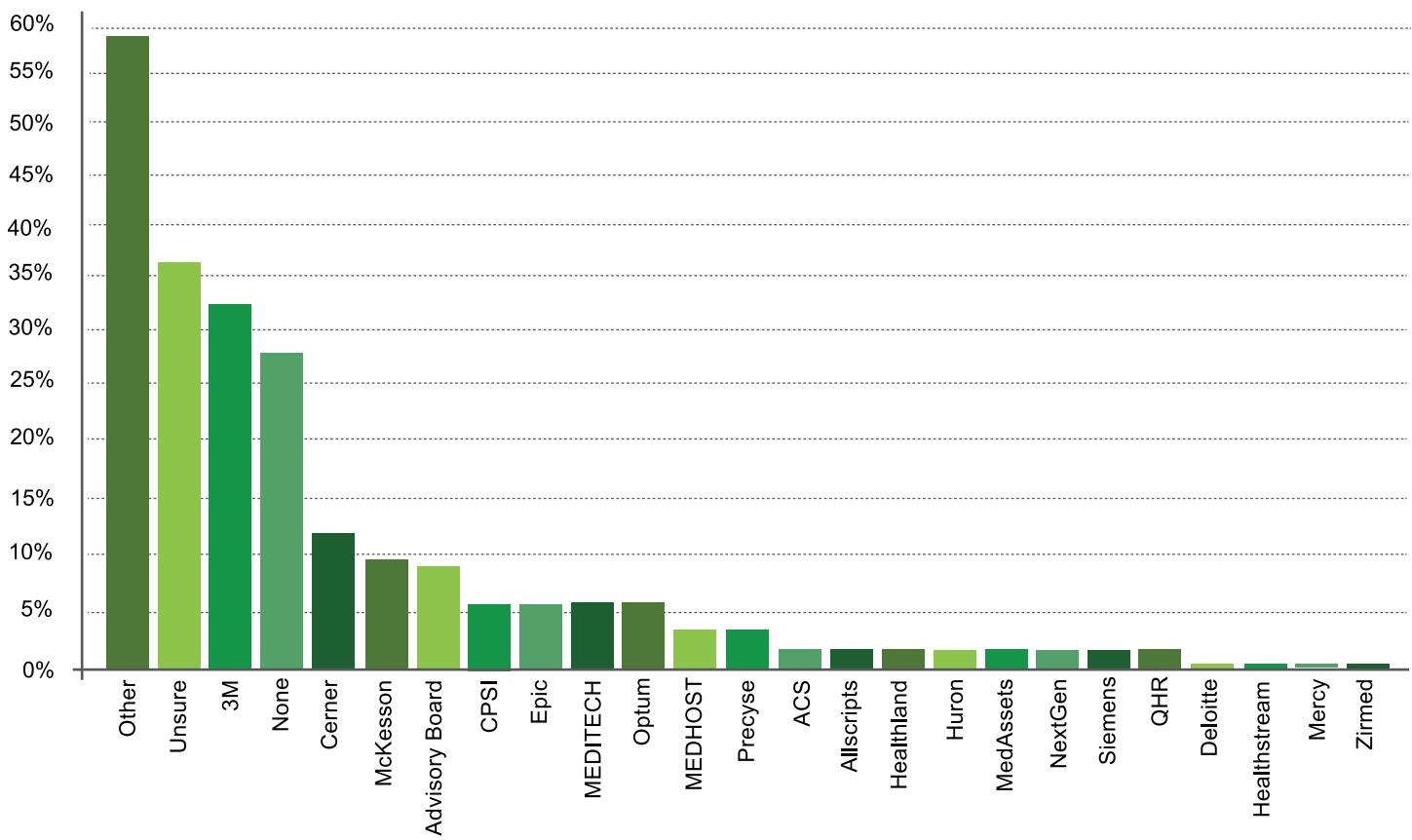


Figure 100: ICD-10 Migration Mindshare < 100 Beds

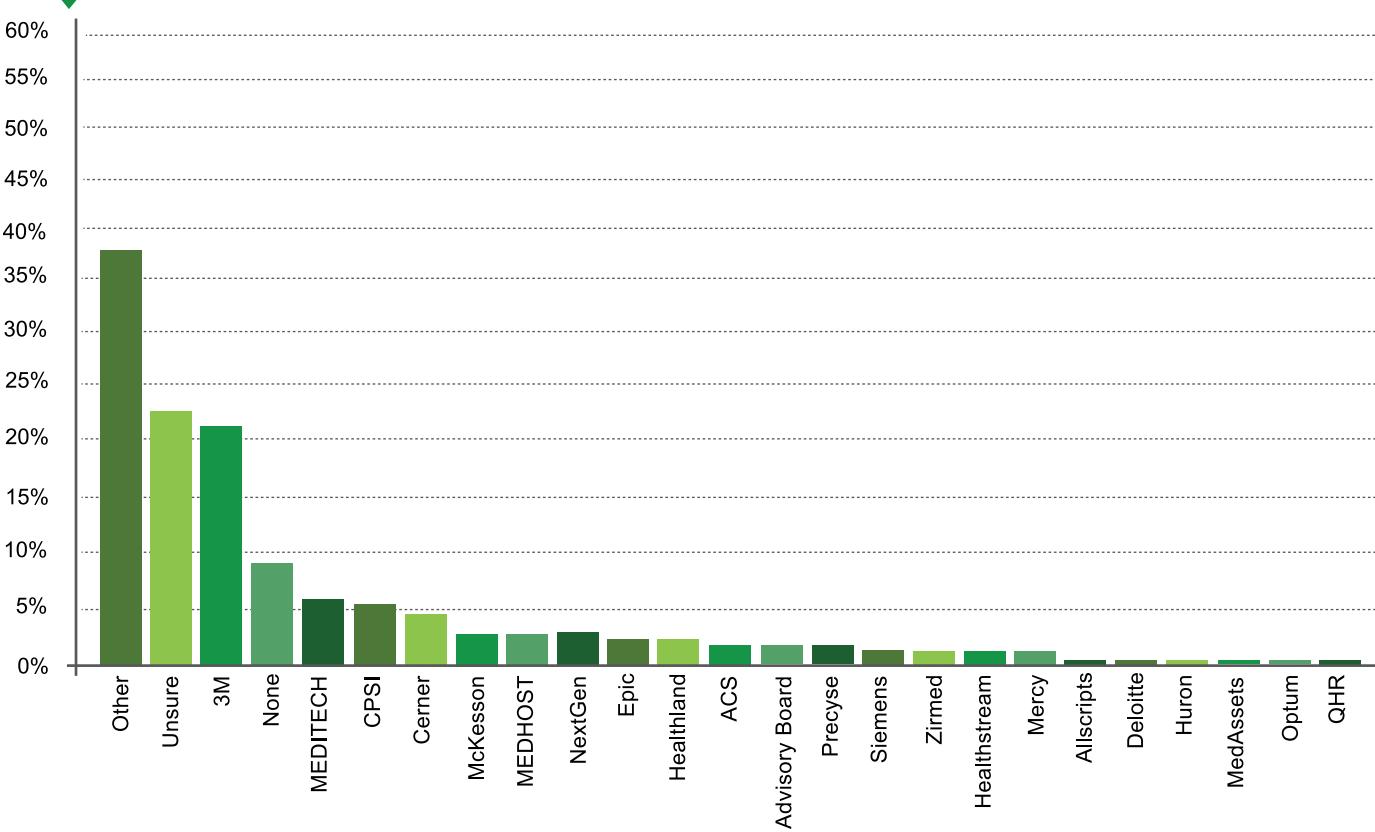


Figure 101: ICD-10 Migration Mindshare 100-250 Beds

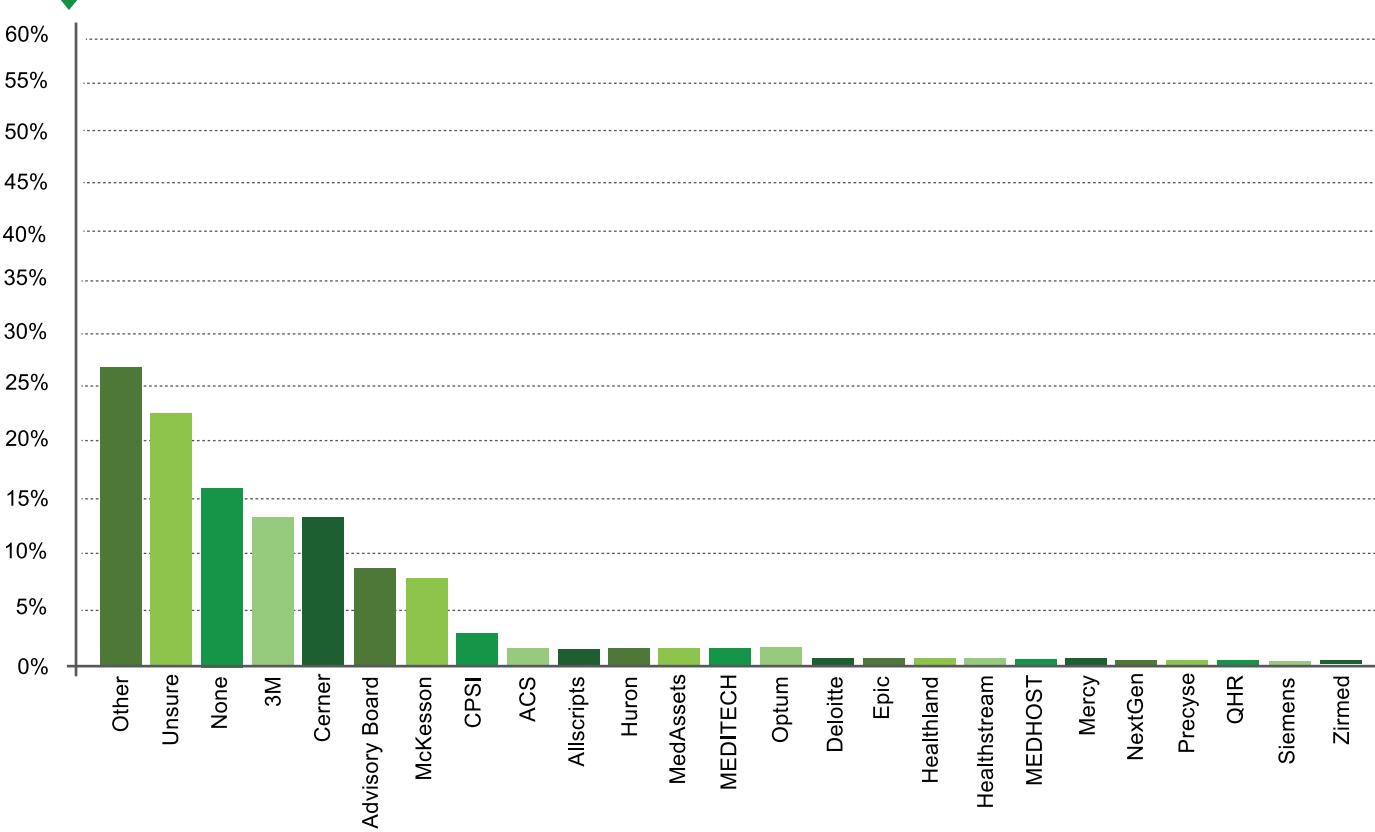


Figure 102: ICD-10 Migration Mindshare 251-500 Beds

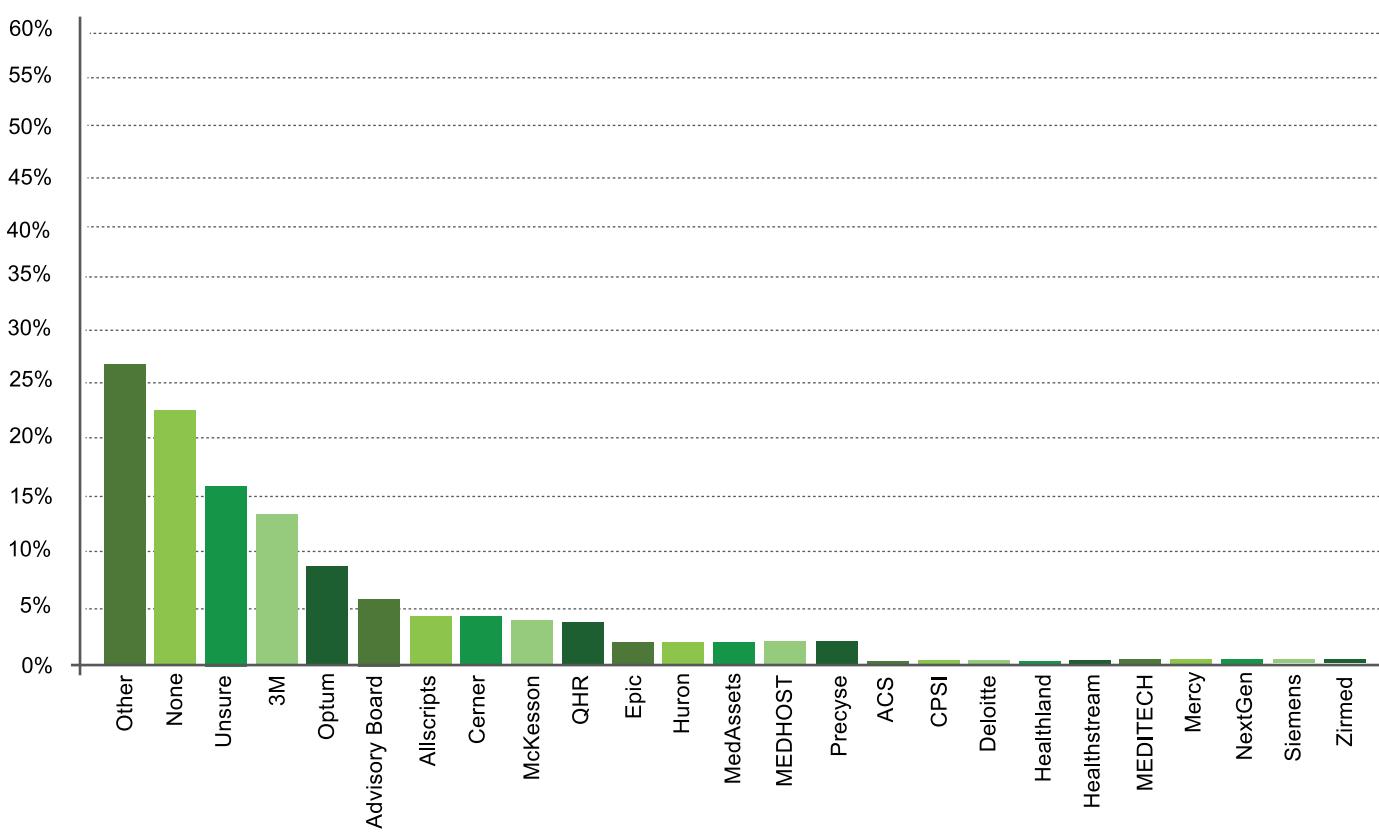


Figure 103: ICD-10 Migration Mindshare 501-1000 Beds

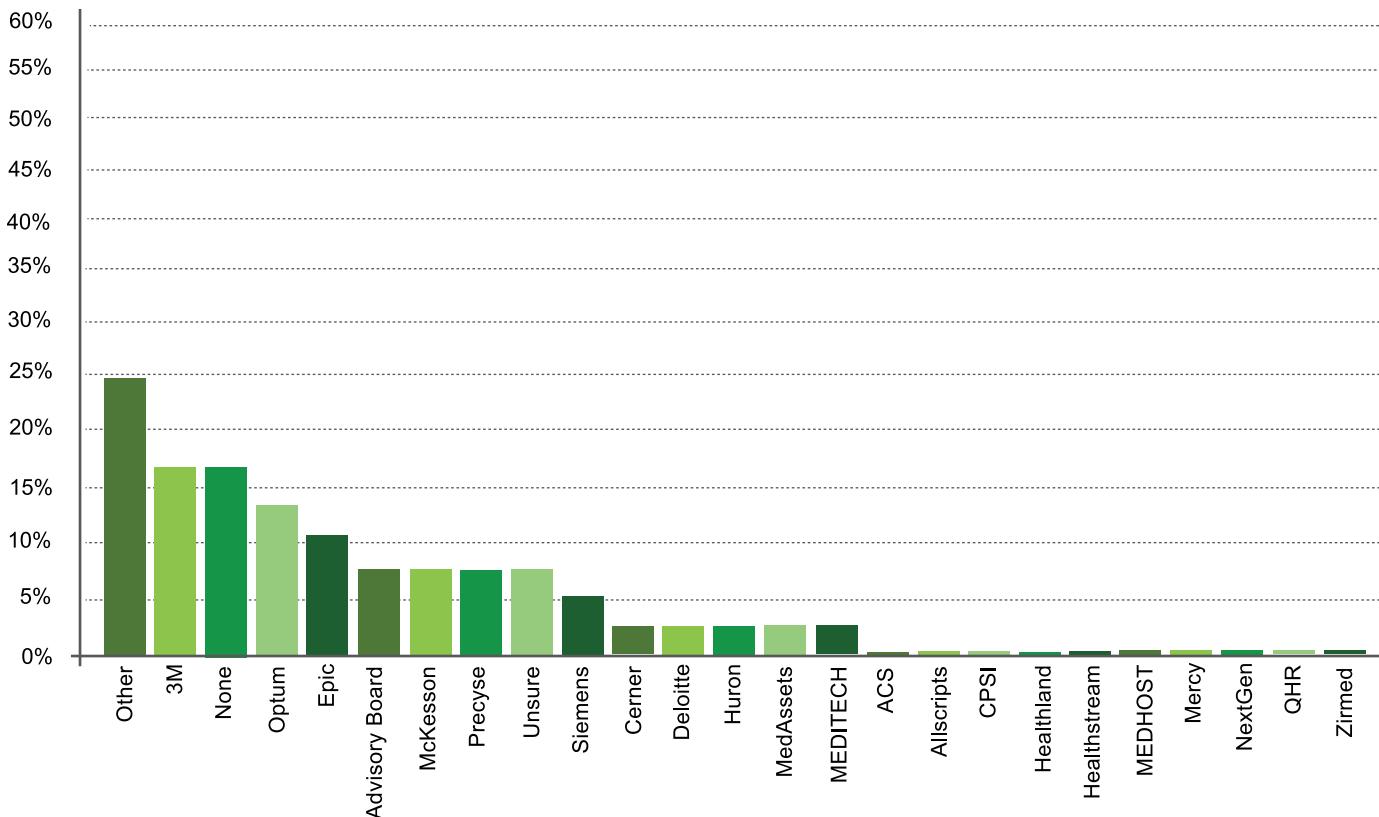
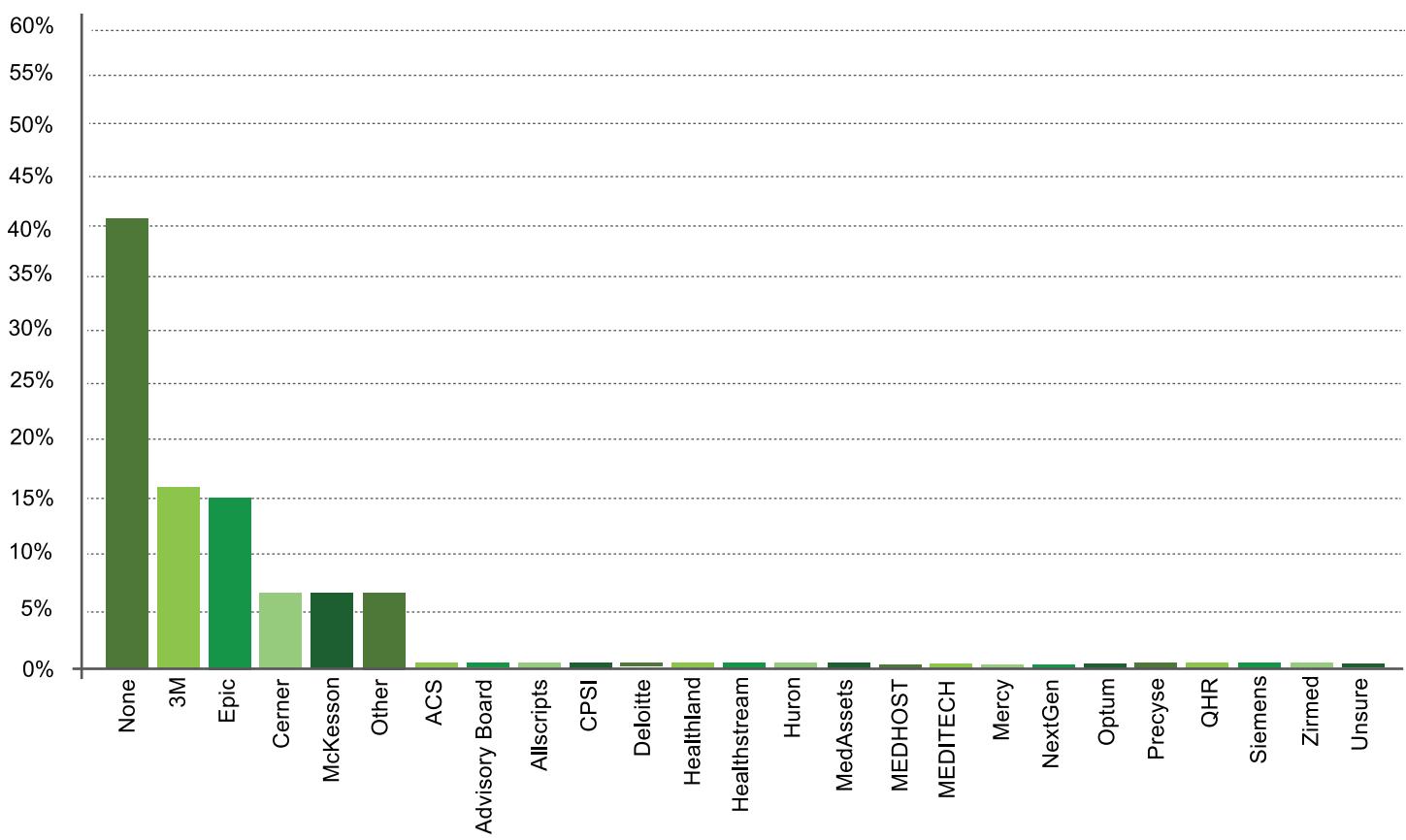


Figure 104: ICD-10 Migration Mindshare > 1000 Beds

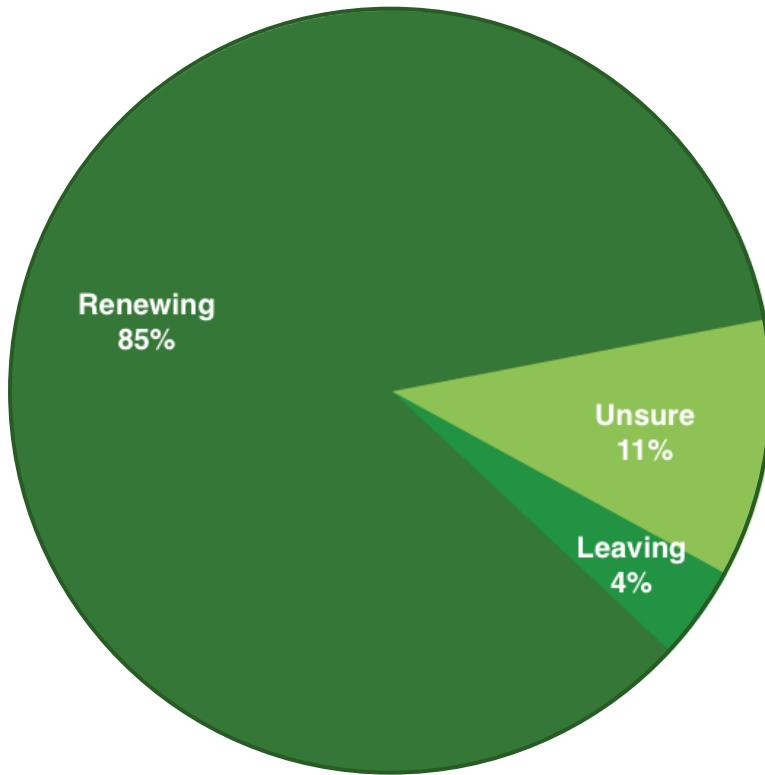


ICD-10 Migration Renewal

A strong majority of hospitals working on ICD-10 in 2015 will continue to work with the same vendors.

Note: We do have specific renewal rates for each unique vendor, but they won't be provided in this report. peer60 would be happy to provide each vendor's renewal rate. Please contact Jeremy Bikman, jbikman@peer60.com, and he can provide that information in a phone call.

Figure 105: ICD-10 Migration Renewal



Conclusion

Billions are going to be spent in 2015 on medical technology and this report of data collected just a few weeks ago shows where a lot of that money is headed. Some vendors are in line to gobble up market share while others will be holding on for dear life.

The good news for everyone in the industry is that the market is not settled. Many hospitals are unsure how they are going to spend in 2015, which leaves an opening for vendors that are struggling to regain footing. It also serves as an opportunity for those who are dominating to increase their lead.

What will happen? That's anyone's guess, but we'll know how things went down this time next year. Best of luck to healthcare vendors on another big year.

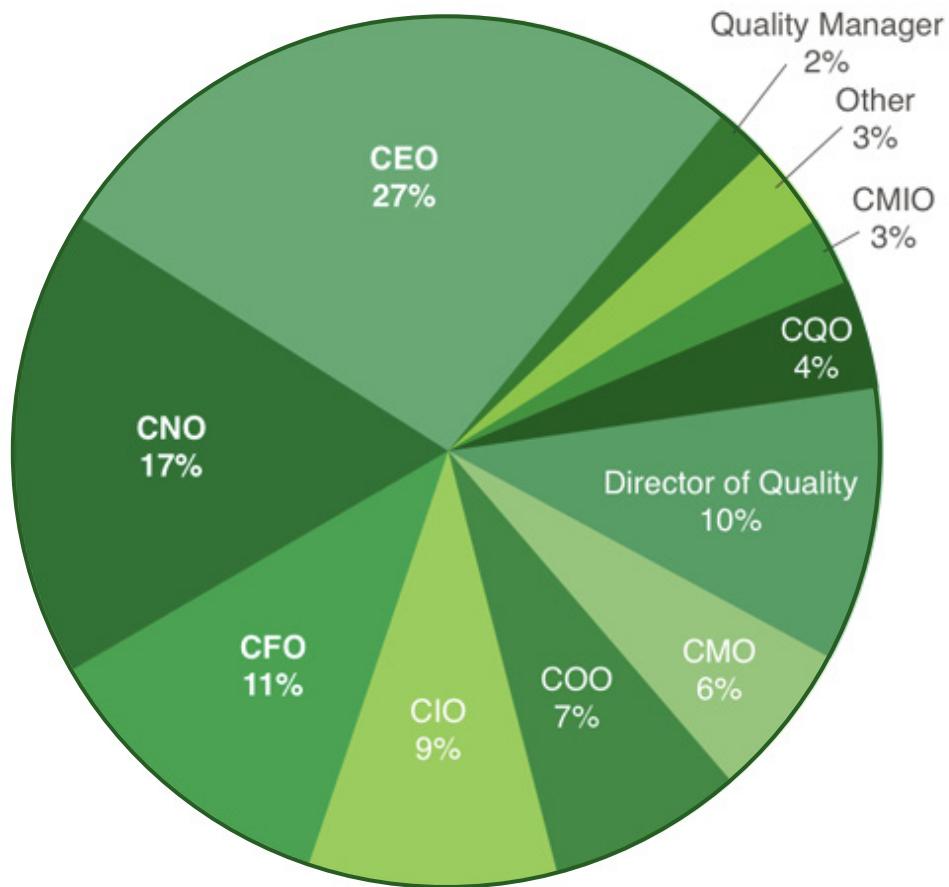
**Note – If you've read this data closely, you can probably guess that we know a lot more than we've published here. That's deliberate. Every company has its strengths and its weaknesses and, frankly, we aren't interested in airing anyone's dirty laundry. That being the case, if you want this specific (and private) information about your company, feel free to contact Jeremy Bikman (jbikman@peer60.com). He will be happy to talk you through the specific results related to your company.*

Appendix A

Survey Participants by Role

In three weeks, this study received feedback representing purchasing decisions in a quarter of United States hospitals. Even more impressive, 80% of the hospital leaders who responded have C-level titles. Here is a title breakdown:

Figure 106: Survey Participants by Role



Appendix B

Every vendor that appeared multiple times in this report was given the opportunity to provide content in it (at no cost). The following are analyst notes on vendors who chose not to do so.



3M

3M is virtually the only major brand with substantial mindshare and market share in the realm of ICD-10 migration. Given that ICD-10 is poised to be one of the biggest solutions purchased this year, that's a big deal. 3M flat out dominates mindshare and is poised for a big year in 2015.



Cerner

Like Epic, Cerner is poised to gain market share in 2015 and is most popular among large facilities. Unlike Epic, it appears to appeal to virtually every size of hospital in the country. While you won't see Cerner dominating every specific class of hospital, it does have material strength in every single market in healthcare. That's impressive.

Cerner's sweet spot seems to be over 1000 beds, where it often beats out even Epic for mindshare.



CPSI

CPSI appeals to very small facilities and it has historically done so very well. Its EHR and Patient Engagement solutions both lead market share among hospitals with fewer than 100 beds.

eClinicalWorks

eClinicalWorks

eClinicalWorks appeals to clinics with its solutions focused on outpatient treatment. It is well respected and appears poised to retain market share and expand in 2015.



Medical Information Technology, Inc.

MEDITECH

Hospitals in the 100-250 bed range love MEDITECH. It is really that simple. More than any other vendor, MEDITECH has zeroed in on a certain size of the market and is really dominating it.

Appendix C

Participating Facilities

One quarter of US Hospitals were represented in this study. The following facilities and health systems participated:

Abbeville General Hospital
Abington Memorial Hospital
Acuity Hospital of South Texas, LLC
Adair County Memorial Hospital
Adams County Regional Medical Center
Adventist La Grange Memorial Hospital
Adventist Medical Center - Portland
Akron General Health System
Akron General Medical Center
Alameda Health System
Alaska Native Medical Center
All Children's Hospital
Alleghany County Memorial Hospital
Alpena Regional Medical Center
Andalusia Regional Hospital
Anderson Hospital
Anna Jaques Hospital
Arizona Spine & Joint Hospital
Arkansas Heart Hospital
Arkansas Surgical Hospital
Aspirus Keweenaw Hospital
Assumption Community Hospital
Atlantic General Hospital
Atlantic Health System
Auburn Community Hospital
Aultman Hospital
Aurora Health Care
Aurora St. Luke's Medical Center
Avera St. Anthony's Hospital
Avera St. Benedict Health Center
Avoyelles Hospital
Bakersfield Heart Hospital
Banner Fort Collins Medical Center
Banner Gateway Medical Center
Banner Health
Baptist Health Extended Care Hospital
Baptist Health Medical Center - Heber Springs
Baptist Health System
Baptist Hospital
Baptist Memorial Hospital - DeSoto
Baptist Memorial Hospital - Memphis
Baptist Memorial Hospital - Tipton
Baraga County Memorial Hospital
Basin Healthcare Center
Baton Rouge General Medical Center
Bay Area Medical Center
Bayfront Health Brooksville
Baystate Franklin Medical Center
Baystate Health
Beaumont Hospital - Royal Oak
Benefis Health System
Benson Hospital
Bergen Regional Medical Center
Berkshire Medical Center
Bethesda Memorial Hospital
Big Sandy Medical Center
Blessing Health System
Blue Mountain Hospital District
Bluegrass Community Hospital
Boca Raton Regional Hospital
Bon Secours Hospital
Boone County Health Center
Boone County Hospital
Boone Hospital Center
Borgess Health
Boston Children's Hospital
Boulder Community Foothills Hospital
Boulder Community Hospital
Bozeman Deaconess Hospital
Braxton County Memorial Hospital

Breckinridge Memorial Hospital
Bristol Hospital
Brodstone Memorial Hospital
Bronx - Lebanon Hospital Center
Brookwood Medical Center
Broward General Medical Center
Butler Health System
Caldwell Medical Center
California Pacific Medical Center - California Campus
Calvary Hospital, Inc.
Calvert Memorial Hospital
Campbell County Memorial Hospital
Cape Canaveral Hospital
Cape Coral Hospital
Cape Regional Medical Center
Capital Medical Center
CarePoint Health
Caribou Memorial Hospital
Carilion Roanoke Memorial Hospital
Carle Clinic - Danville
Carle Foundation Hospital
Carlisle Regional Medical Center
Carroll County Memorial Hospital
Carson City Hospital
Cartersville Medical Center
Carthage Area Hospital
Cass Regional Medical Center
Castleview Hospital
Cayuga Medical Center at Ithaca
Centennial Medical Center
Central Community Hospital
Charlotte Hungerford Hospital
CHE Trinity Health
Cheshire Medical Center/Dartmouth - Hitchcock Keene
Children's Health Care
Children's Hospital Medical Center of Akron
Children's Hospital of Los Angeles
Children's Mercy Hospitals & Clinics
Children's Specialized Hospital
Chinese Hospital
Chippewa County - Montevideo Hospital
Chippewa County War Memorial Hospital
CHRISTUS Health
CHRISTUS ST MICHAEL HEALTH
Cibola General Hospital
Citrus Memorial Hospital
City of Hope Research Hospital & Cancer Treatment
Clara Barton Hospital
Claxton-Hepburn Medical Center
Clearview Regional Medical Center
Cleveland Area Hospital
Cleveland Clinic Hospital - Cleveland
Clinch Memorial Hospital
Clinton Memorial Hospital
Cobre Valley Regional Medical Center
Coffee Regional Medical Center
Coleman County Medical Center
College Station Medical Center
Colquitt Regional Medical Center
Columbia Memorial Hospital
Columbus Regional Hospital
Comanche County Medical Center
Community Hospital
Community Medical Center, Inc.
Community Memorial Hospital
Confluence Health
Connally Medical Center
Cook Children's Health Care System
Cooperstown Medical Center
Copper Basin Medical Center
Corona Regional Medical Center
Covenant Health
Cox Medical Center Branson
Crenshaw Community Hospital
Crete Area Medical Center
Crossing Rivers Health Medical Center
Crouse Hospital
Cullman Regional Medical Center
Cumberland Memorial Hospital
Curry General Hospital
Daughters of Charity Health System
Davis Medical Center
Dayton General Hospital
Deaconess Cross Pointe
Dearborn County Hospital
Decatur County General Hospital

Decatur County Hospital
Decatur County Memorial Hospital
DeKalb Health
DeKalb Medical at Downtown
DeKalb Memorial Hospital
Delano Regional Medical Center
Delhi Hospital
Delta Regional Medical Center
DeSoto Memorial Hospital
District One Hospital
Divine Savior Hospital
Doctors Community Hospital
Doctors Hospital at Renaissance
Doctors Specialty Hospital
Dosher Memorial Hospital
Dr. John Warner Hospital
Drew Memorial Hospital
Duke University Hospital
East Cooper Medical Center
East Orange General Hospital
East Tennessee Children's Hospital
Eastern Idaho Regional Medical Center
Eastern New Mexico Medical Center
Eastern Plumas Hospital
Eastland Memorial Hospital
Elbert Memorial Hospital
Erie County Medical Center
Essentia Health Holy Trinity Hospital
Essentia Health Northern Pines (Aurora)
Essentia Health St. Joseph's Brainerd
Essex Valley Healthcare
Estes Park Medical Center
ETMC Athens
Excela Health
Excelsior Springs Hospital
Fairbanks Memorial Hospital
Fairview Hospital
Fairview Park Hospital
Fairview Regional Medical Center
Fairview Ridges Hospital
Fallon Medical Complex
Fannin Regional Hospital
Fawcett Memorial Hospital
Fayette Regional Health System
FHN Memorial Hospital
FirstHealth Richmond Memorial Hospital
Fishermen's Community Hospital
Fitzgibbon Hospital
Flambeau Hospital
Fletcher Allen Health Care
Fletcher Allen Partners
Florida Hospital
Florida Hospital Kissimmee
Florida Hospital North Pinellas
Florida Hospital Waterman
Florida Hospital Wauchula
Floyd Medical Center
Forest Hills Hospital
Forest Park Medical Center Frisco
Fort Memorial Hospital
Fort Walton Beach Medical Center
Franklin County Memorial Hospital
Franklin General Hospital
Franklin Hospital
Franklin Medical Center
Galion Community Hospital
Garfield Medical Center
Garrison Memorial Hospital
Gaston Memorial Hospital
Genesis Medical Center - Silvis
Geneva General Hospital
Georgetown Community Hospital
Georgia Regents Health System
Georgiana Medical Center
Gibson Area Hospital & Health Services
Gifford Medical Center
Gila River Health Care
Gilbert Hospital
Glendive Medical Center
Glenn Medical Center
Good Samaritan Hospital
Good Samaritan Hospital - WA
Good Samaritan Hospital Medical Center
Goodall-Witcher Hospital
Gothenburg Memorial Hospital
Grace Cottage Hospital

Grace Medical Center
Grady Memorial Hospital
Graham Hospital
Grand River Hospital
Granite County Medical Center
Granville Health System
Grays Harbor Community Hospital
Great Bend Regional Hospital
Great Plains Regional Medical Center
Great River Medical Center
Great River Medical Center - IA
Greene County General Hospital
Greenville Health System
Greenwood County Hospital
Guadalupe County Hospital
Guadalupe Regional Medical Center
Gunnison Valley Hospital
Guthrie Troy Community Hospital
Gwinnett Hospital System
Hackensack University Health Network
Hackensack University Medical Center
Hahnemann University Hospital
Hallmark Health
Hamilton General Hospital
Hannibal Regional Hospital
Hanover Hospital
Hardin Medical Center
Hardin Memorial Hospital
Harmon Memorial Hospital
Harrison Community Hospital
Harrison County Hospital
Hawarden Community Hospital
Hayes Green Beach Memorial Hospital
HealthEast Care System
Helen Newberry Joy Hospital
Henry Mayo Newhall Memorial Hospital
Hereford Regional Medical Center
Highlands-Cashiers Hospital
Hill Hospital Of Sumter County
Hillcrest Memorial Hospital
Holdenville General Hospital
Holy Name Medical Center
Holy Spirit Health System
Holy Spirit Hospital
Holzer Gallipolis Campus
Homer Memorial Hospital
Hopkins County Memorial Hospital
Hospital for Special Surgery
Hospital of the University of Pennsylvania
HSHS Eastern WI Division- St Vincent
Huntsville Memorial Hospital
Iberia Medical Center
ICON Hospital
Illinois Valley Community Hospital
Indiana University Health Blackford Community Hospital
Indiana University Health North Hospital
Indiana University Health University Hospital
Ingalls Memorial Hospital
Inova Fairfax Medical Campus
Inova Medical Group
Inspira Health Network
Inspira Medical Center - Elmer
INTEGRIS Bass Baptist Health Center
Intermountain Healthcare
Iron County Medical Center
Island Hospital
Jackson Hospital & Clinic
Jameson Hospital
Jamestown Regional Medical Center
Jane Todd Crawford Hospital
Jefferson Community Health Center
Jefferson Health System
Jennie Edmundson Hospital
Jersey City Medical Center
John C. Fremont Hospital
John C. Lincoln Hospital - North Mountain
John C. Stennis Memorial Hospital
Johnson Memorial Health Services
Johnson Memorial Health Services - Dawson Clinic
Johnson Memorial Hospital
Ka'u Hospital & Rural Health Clinic
Kalispell Regional Medical Center
Katherine Shaw Bethea Hospital
Keck Hospital of USC
Kenmare Community Hospital and Trinity Health
Kennedy Health System

Kentfield Rehabilitation & Specialty Hospital
Kimble Hospital
Kindred Hospital - Baytown
Kindred Hospital - Rancho
Kindred Hospital - Rome
Kindred Hospital - Sycamore
Kindred Hospital - Tarrant County - Arlington
Kindred Rehabilitation Hospital - Northeast Houston
King's Daughters Medical Center
King's Daughters Medical Center - MS
Kingman Community Hospital
Kirby Medical Center
Kittitas Valley Healthcare
Klickitat Valley Hospital
Knox Community Hospital
Kuakini Medical Center
La Paz Regional Hospital
Lackey Memorial Hospital
Lafayette Regional Health Center
Lake Charles Memorial Hospital
Lake Cumberland Regional Hospital
Lakeway Regional Medical Center
Lakewood Health System
Lamb Healthcare Center
Lancaster General Hospital
Lane Regional Medical Center
Latimer County General Hospital
Laurel Regional Hospital
Lawrence Hospital
Lawrence Memorial Hospital
Le Bonheur Children's Medical Center
Lee Memorial Hospital
Legacy Health
Lexington Medical Center
Lexington Regional Health Center
Little River Memorial Hospital
Litzenberg Memorial County Hospital
Logan County Hospital
Logan Memorial Hospital
Logan Regional Medical Center
Loma Linda University Health
Loma Linda University Medical Center - Murrieta
Loma Linda University Medical Center-Murrieta

Longmont United Hospital
Longview Regional Medical Center
Lourdes Health network
LSU Health Care Services Division
Lubbock Heart Hospital
Lucas County Health Center
Mad River Community Hospital
Magnolia Regional Health Center - MS
Magnolia Regional Medical Center
Mahaska Health Partnership
Maimonides Medical Center
Main Line Health System
Major Hospital
Manati Medical Center (Dr. Alejandro Otero Lopez)
Manning General Hospital
Maricopa Medical Center
Marion General Hospital
Marlette Regional Hospital
Marshall Medical Center
Marshfield Clinic Health System
Martin Health System
Mary Lanning Memorial Hospital
Mary Washington Hospital
Mason District Hospital
Massena Memorial Hospital
Mayers Memorial Hospital District
Mayo Clinic Health System - Albert Lea
McAlester Regional Health Center
McCready Memorial Hospital
McGehee Hospital
McKenzie County Hospital
McKenzie Memorial Hospital
McLaren - Lapeer Region
MCV Hospitals
Meadowlands Hospital Medical Center
Medical Arts Hospital
Medical Center of Central Georgia
Medical Center of Central Georgia (MCCG)
Medical Center of Lewisville
Medical director of virtua MarLton
Medical University Hospital
Medina Memorial Hospital
Medina Regional Hospital

Memorial Health Center
Memorial Healthcare Center - MI
Memorial Hermann Katy Hospital
Memorial Hermann Memorial City Hospital
Memorial Hermann TIRR
Memorial Hospital
Memorial Hospital & Healthcare Center
Memorial Hospital at Gulfport
Memorial Hospital of Carbon County
Memorial Hospital of Converse County
Memorial Hospital of Gardena
Memorial Hospital of Texas County
Memorial Hospital Pembroke
Memorial Medical Center
Memorial Medical Center of Las Cruces
Memorial Sloan Kettering Cancer Center
Mendota Community Hospital
Mercy Fitzgerald Hospital - MHS-SEPA-MF
Mercy Harvard Hospital
Mercy Hospital Lebanon
Mercy Hospital of Defiance
Mercy Medical Center
Mercy Medical Center - Centerville
Mercy Medical Center - Des Moines
Mercy Regional Health Center
Mercy Springfield - Regional Hospitals
Mercy St. Anne Hospital
Methodist Health System
Methodist Hospital
Methodist Hospital of Chicago
Methodist North Hospital
Methodist Richardson Medical Center
Metro Health Hospital
Mid Coast Hospital
Midland Memorial Hospital
MidMichigan Medical Center - Midland
Mile Bluff Medical Center
Milford Regional Medical Center
Milford Valley Memorial Hospital
Miller County Hospital
Millinocket Regional Hospital
Mills peninsula health system
Miners' Colfax Medical Center
Ministry Health System
Miriam Hospital
Mission Community Hospital
Mission Hospital
Mission Hospital - Laguna Beach
Mitchell County Hospital
Monadnock Community Hospital
Monongahela Valley Hospital
Montgomery County Memorial Hospital
Montrose Memorial Hospital
Morgan Memorial Hospital
Morristown Medical Center
Motion Picture & Television Hospital
Mount Sinai Queens
Mountain Lakes Medical Center
Mountain View Hospital
Muhlenberg Community Hospital
MultiCare Health System
Muncy Valley Hospital
MUSC Medical Center
Navicent Health
Nell J. Redfield Memorial
Neshoba County General Hospital
Ness County Hospital
Newman Memorial Hospital
Newman Regional Health
Newton Medical Center
Norman Regional Health System
Norman Regional Hospital
North Caddo Medical Center
North Canyon Medical Center
North Carolina Specialty Hospital
North Cypress Medical Center
North Florida Regional Medical Center
North Georgia Medical Center
North Hawaii Community Hospital
North Ottawa Community Hospital
North Shore LIJ
Northeast Georgia Medical Center
Northern Cochise Community Hospital
Northern Inyo Hospital
Northport Medical Center
Northstar Health System

Northwest Medical Center
Northwest Texas Healthcare System
Norton Audubon Hospital
Norton County Hospital
Norton Hospital
Nyack Hospital
OakLeaf Surgical Hospital
Ochsner Baptist Medical Center
Ochsner Health System
Ochsner Medical Center - Baton Rouge
Oconee Regional Medical Center
Ohio Valley General Hospital
Okeene Municipal Hospital
Olathe Medical Center
Orlando Health
Osceola Medical Center
OSF Holy Family Medical Center
OSF St. Mary Medical Center
Oswego Hospital
OSWEGO MEDICAL CENTER
Ottawa County Health Center
Otto Kaiser Memorial Hospital
OU Medical Center & The Children's Hospital at OU Medical Center
Our Community Hospital
Overlake Hospital Medical Center
Owensboro Health Regional Hospital
P & S Surgical Hospital
Page Hospital
Palisades Medical Center
Palomar Medical Center
Pardee Hospital
Park Plaza Hospital
Parkview Community Hospital
Parkview Regional Hospital
Parmer Medical Center
Paulding County Hospital
PeaceHealth
PeaceHealth Sacred Heart Medical Center University District
Pearl River County Hospital
Penn Presbyterian Medical Center
Penn State Milton S. Hershey Medical Center
Pennock Hospital
Penobscot Valley Hospital
Perry County Memorial Hospital
Perry Memorial Hospital
Perry Memorial Hospital - IL
Petersburg Medical Center
Phelps Memorial Hospital Center
Phillips County Hospital
Piedmont Fayette Hospital
Piedmont Healthcare - NC
Pikeville Medical Center
Pioneers Medical Center
Pleasant Valley Hospital
PMG Clinic at Dr. Dan C. Trigg Memorial Hospital
Pocahontas Memorial Hospital
Pomona Valley Hospital Medical Center
Poplar Bluff Regional Medical Center
Portneuf Medical Center
Power County Hospital
Prague Municipal Hospital
Pratt Regional Medical Center
Presbyterian Hospital
Presence Sts. Mary and Elizabeth's Medical Center
Presentation Medical Center
Promise Hospital of Louisiana - Shreveport Campus
Promise Hospital of Miss Lou
Promise Hospital of Salt Lake
Providence Memorial Hospital
Punxsutawney Area Hospital
Pushmataha Hospital & Home Health
Putnam County Memorial Hospital
Putnam General Hospital
Putnam Hospital Center
Rady Children's Hospital - San Diego
Randolph Hospital
Rapides Regional Medical Center - Rapides Healthcare System, LLC
Ray County Memorial Hospital
Red Bay Hospital
Red River Regional Hospital
Redington-Fairview General Hospital
Reeves County Hospital
Regional Medical Center Anniston

Regional Medical Center of San Jose
Regional One Health
Regional West Medical Center
Renown South Meadows Medical Center
Retreat Doctors Hospital
Rhode Island Hospital - Hasbro Children's Hospital
Rice Memorial Hospital
Richardson Medical Center
Ringgold County Hospital
River Park Hospital
River's Edge Hospital & Clinic
Riverside Health System
Riverside Medical Center
Riverside Tappahannock Hospital
Riverside Walter Reed Hospital
RiverView Hospital
Riverview Regional Medical Center
Riverwood Healthcare Center
Rockdale Medical Center
Rome Memorial Hospital
Roosevelt General Hospital
Roundup Memorial Hospital
Rusk County Memorial Hospital
Sacred Heart Hospital on the Gulf
Salina Surgical Hospital
Samaritan Hospital
Samaritan Medical Center
Samaritan Pacific Communities Hospital
San Francisco General Hospital Medical Center
San Gabriel Valley Medical Center
San Juan County Hospital
San Juan Regional Medical Center
Santa Clara Valley Medical Center
Santiam Hospital
Sarah D. Culbertson Memorial Hospital
Schneck Medical Center
Schuylkill Medical Center - South Jackson Street
Scott County Hospital
Scripps Health
Sedan City Hospital, Pawhuska Hospital, Inc. & Jane
Phillips Nowata Health Center
Seminole Medical Center
Seminole Memorial Hospital

Shands Children's Hospital
Sharp Chula Vista Medical Center
Sharp Coronado Hospital & Healthcare Center
Shawnee Mission Medical Center
Shepherd Center
Sheridan Community Hospital
Sheridan County Health Complex
Shriners Hospital - Philadelphia
Sierra Medical Center
Sierra Vista Regional Health Center
Silver Lake Medical Center
Sisters of Providence - SPHSMA
Sistersville General Hospital
Skagit Valley Hospital
Sky Lakes Medical Center
Slidell Memorial Hospital
SLV Health Conejos County Hospital
South Sunflower County Hospital
South Texas Spine & Surgical Hospital
Southampton Memorial Hospital
Southeast Georgia Health System - Brunswick Campus
Southeast Michigan Surgical Hospital
Southeastern Ohio Regional Medical Center
Southern Hills Hospital & Medical Center
Southern Tennessee Medical Center
Southern TN Regional Health System
Southwest General Health Center
Southwest General Hospital
Spanish Peaks Regional Health Center
Spencer Hospital
Springfield Hospital
St. Alexius Medical Center
St. Anthony Hospital
St. Anthony's Medical Center
St. Barnabas Hospital
St. Bernard Parish Hospital
St. Catherine Hospital
St. Charles Medical Center - Redmond
St. Claire Regional Medical Center
St. Dominic - Jackson Memorial Hospital
St. Elizabeth Medical Center
St. Francis Hospital
St. Francis Medical Center

St. Helena Hospital Napa Valley
St. James Parish Hospital
St. John Hospital & Medical Center
St. John Medical Center
St. John's Medical Center - WY
St. John's Pleasant Valley Hospital
St. John's Riverside Hospital - Andrus Pavilion
St. Joseph Health Center
St. Joseph Hospital - Orange
St. Joseph Memorial Hospital
St. Joseph Mercy Oakland
St. Joseph Regional Health Center
St. Joseph Regional Medical Center
St. Joseph's Hospital Health Center
St. Joseph's Regional Medical Center
St. Joseph's Women's Hospital
St. Joseph's Children's Hospital
St. Louise Regional Hospital
St. Lucie Medical Center
St. Luke's Hospital
St. Mary Good Samaritan Hospital
St. Mary Medical Center
St. Mary's Community Hospital
St. Mary's Good Samaritan Inc. - Centralia Campus
St. Mary's Health Center - Jefferson City
St. Mary's Hospital - Streator
St. Mary's Janesville Hospital
St. Mary's Regional Medical Center
St. Peter's Hospital
St. Peter's University Health System
St. Peter's University Hospital
St. Vincent Health System
Staten Island University Hospital
Stellaris Health Network
Stephens Memorial Hospital
Stewart Memorial Community Hospital
Stillwater Medical Center
Stonewall Jackson Memorial Hospital
Stonewall Memorial Clinic
Stormont-Vail Regional Health Center
Strong Memorial Hospital - University of Rochester
Sturgis Hospital
Sullivan County Memorial Hospital
Summerlin Hospital Medical Center
Summit Pacific Medical Center
Sumner Regional Medical Center
Susan B. Allen Memorial Hospital
Sutter Medical Center of Santa Rosa
Swedish Medical Center
Syringa General Hospital
Taylor Regional Hospital
Teton Valley Hospital
Texas Health Center for Diagnostics & Surgery
Texas Health Harris Methodist Hospital Azle
Texas Health Presbyterian Allen
Texas Health Presbyterian Hospital Plano
Texas Scottish Rite Hospital for Children
The Aroostook Medical Center
The Bellevue Hospital
The Burke Rehabilitation Hospital
The Callahan Eye Foundation Hospital
The Cambridge Hospital
The Memorial Hospital (part of MaineHealth)
The Memorial Hospital at Craig
The Milton S. Hershey Medical Center
The Regional Medical Center at Memphis
The Valley Hospital
The William W. Backus Hospital
The Women & Children's Hospital of Buffalo
ThedaCare
ThedaCare Medical Center - New London
Thomas H. Boyd Memorial Hospital
Three Rivers Hospital
Tillamook Regional Medical Center
Toppenish Community Hospital
Trace Regional Hospital
Tri-State Memorial Hospital
Trident Medical Center
Trinitas Health
Trinity Hospital
TriStar Skyline Medical Center
Truman Medical Center - Hospital Hill
Tuba City Indian Medical Center
Twin Cities Hospital
Twin County Regional Hospital
Tyler County Hospital

UCSD Medical Center - Hillcrest
UH Bedford Medical Center
UHS Binghamton General Hospital
UM St. Joseph Medical Center
UMass Memorial Medical Center
Union General Hospital
Union Hospital
Union Hospital of Cecil County
Universal Health Services, Inc.
University Hospital
University Hospital of Brooklyn SUNY Center
University Medical Center of Princeton at Plainsboro
University of Alabama Hospital - Birmingham
University of Colorado Hospital
University of Maryland Medical Center
University of Miami Hospital
Upper Chesapeake Health, Inc.
USA Medical Center
USMD Hospital at Arlington
Uvalde Memorial Hospital
UW Medical Center
Val Verde Regional Medical Center
Valley Hospital Medical Center
Valley Presbyterian Hospital
Valley Regional Hospital
Vassar Brothers Medical Center
VCU Medical Center
Vernon Memorial Hospital
Via Christi Rehabilitation Hospital
Virtua Health
WA Foote Memorial Hospital /Allegiance Health
Wahiawa General Hospital
Walker Baptist Medical Center
Walter Knox Memorial Hospital
Washington Hospital
Waukesha Memorial Hospital
Waverly Health Center
Wayne HealthCare
Wayne Hospital
Wayne Memorial Hospital
Weisbrod Memorial County Hospital
WellStar Health System
Wesley Medical Center & Galichia Heart Hospital

West Chester Hospital
West Tennessee Healthcare
Westchester Medical Center
Western Missouri Medical Center
Wheatland Memorial Healthcare
Whidbey General Hospital
White County Medical Center
White Memorial Medical Center
White River Medical Center
Wickenburg Community Hospital