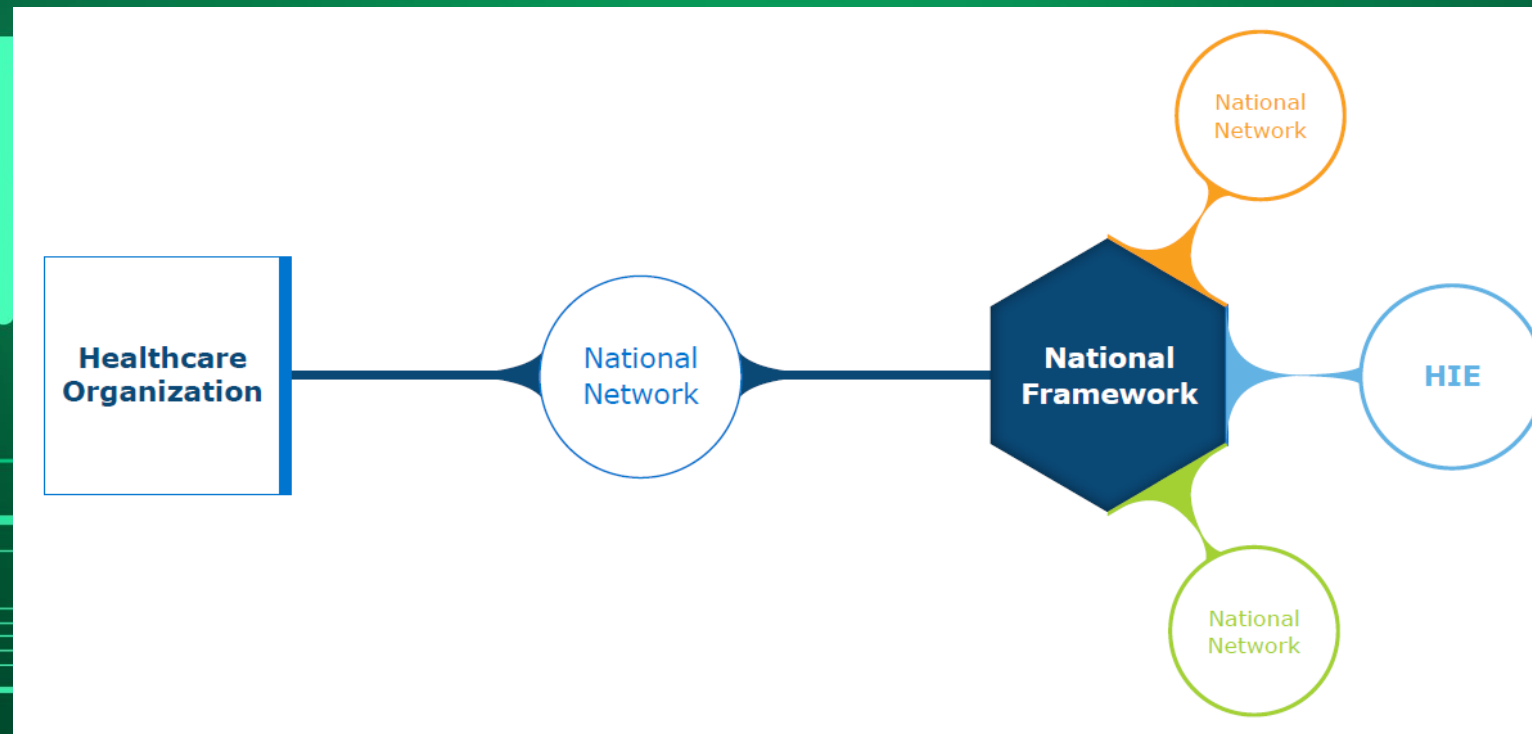
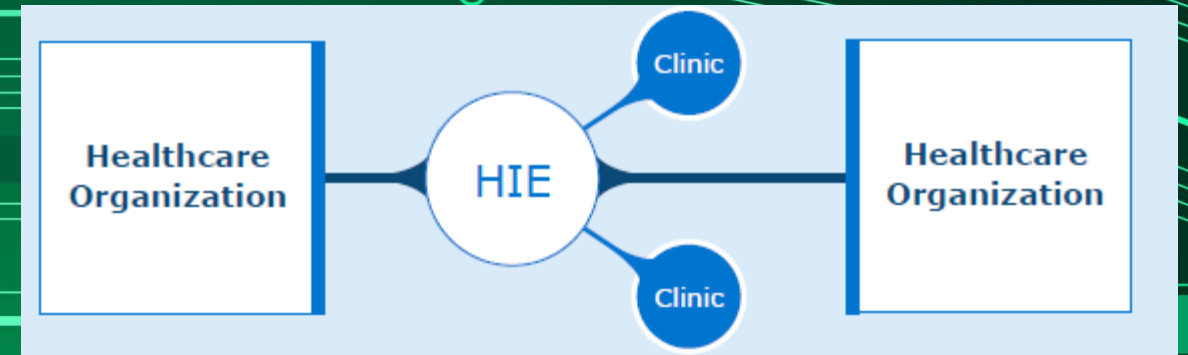
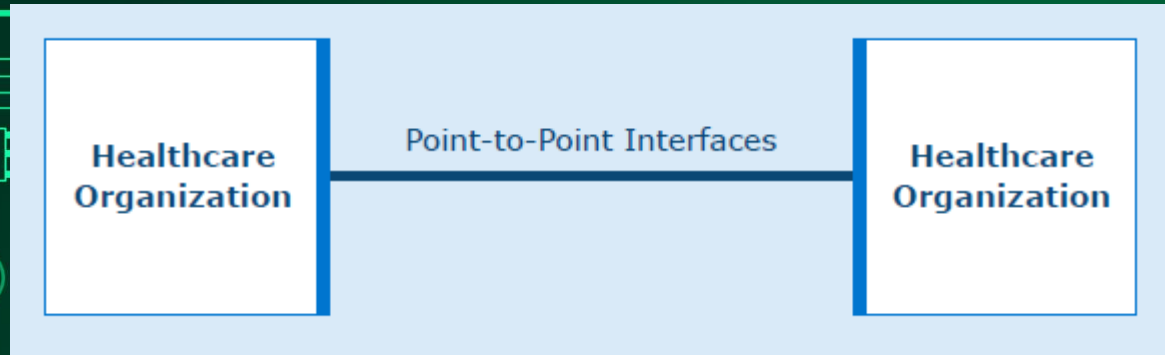


The Technology Revolution

KLAS Data Review 2018

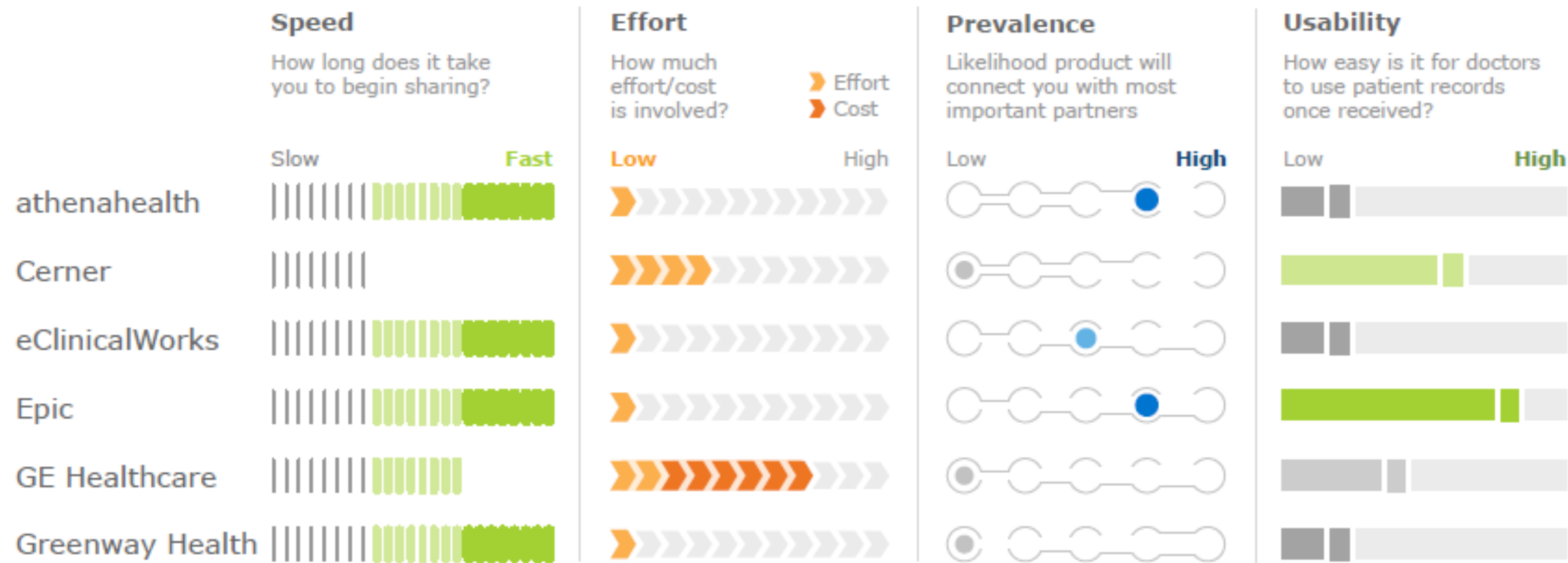
Taylor Davis





Plug and Play: What Are You Saying?

EMR Vendor Impact on Plug-and-Play Patient-Record Sharing



How Prevalent is Adoption?

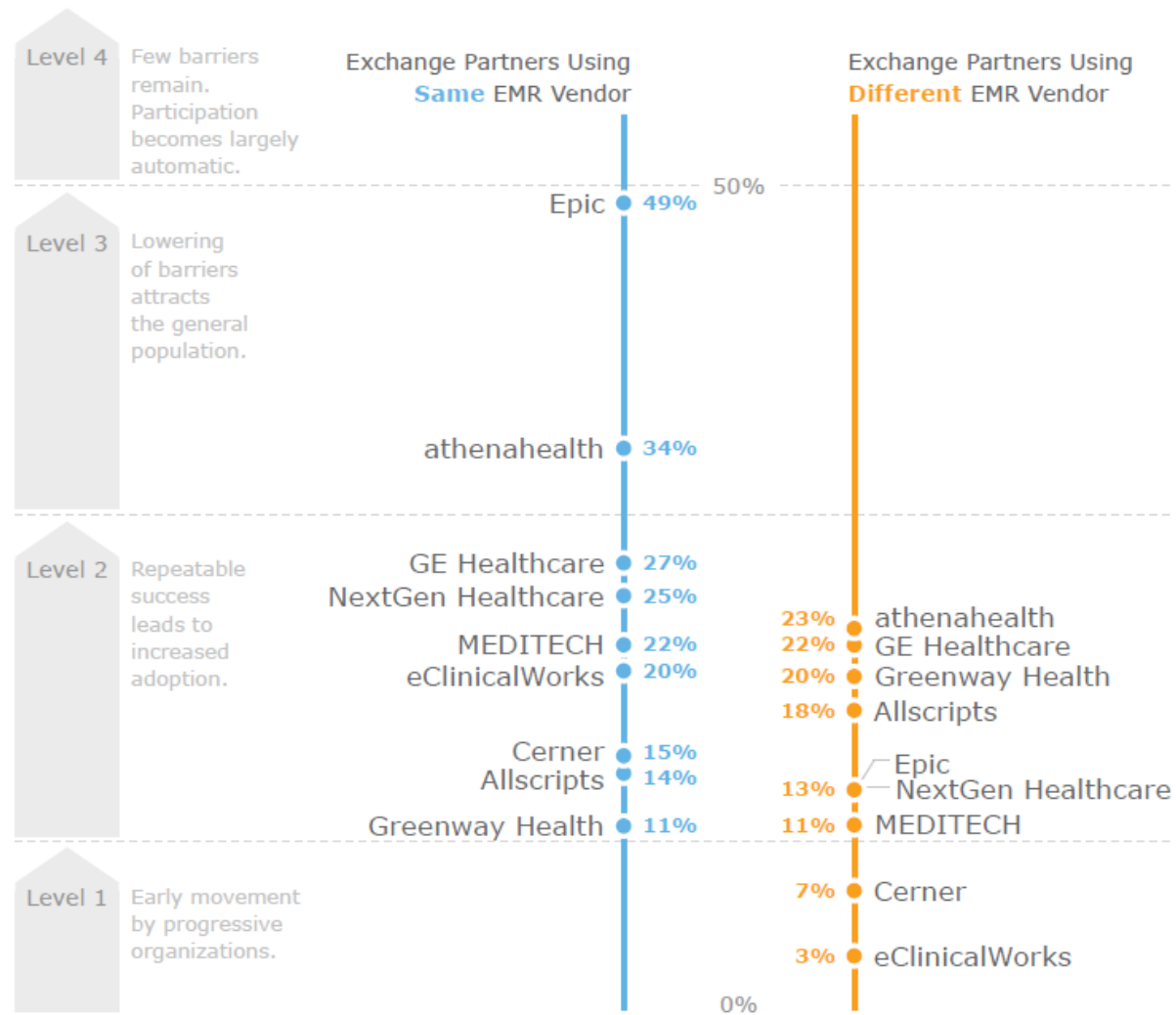
CommonWell & Carequality Adoption

Primary Initiative: ● CommonWell ● Carequality ● Both ● Neither



Deep Interoperability Rate

Same vs. Different EMR Vendor Sharing



"Deep interoperability" exists when providers

1. Have consistent access to outside data
2. Can easily locate patient records
3. Can view outside data inside their EMR workflow
4. Experience frequent, positive impacts on patient care

The data above comes from the Interoperability 2017 report.



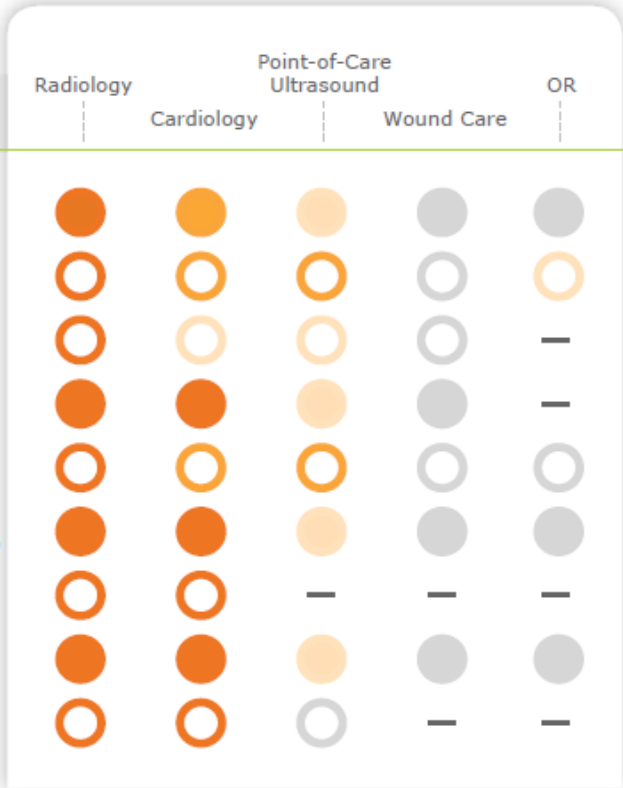
What Are Organizations Connecting?

Most Common Service Lines Connected Today

● >75% ● 51%–75% ● 26%–50% ● 1%–25% — No Validations ○ Limited Data

VNA

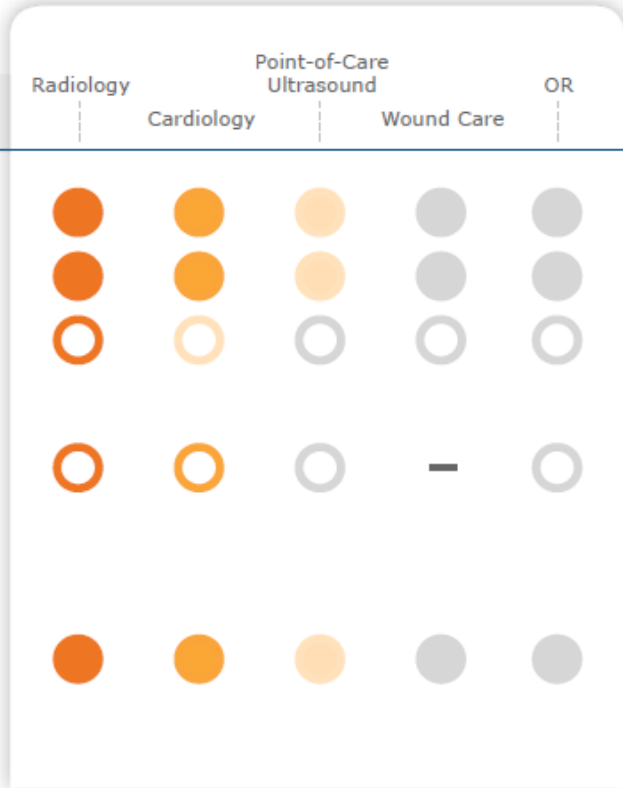
Market Overall (n=115)
Agfa HealthCare (n=10)
Carestream (n=11)
Fujifilm (TeraMedica) (n=17)
GE Healthcare (n=11)
Hyland Healthcare (formerly Lexmark Healthcare) (n=17)
Mach7 Technologies (n=6)
IBM Watson Imaging (Merge) (n=18)
NTT DATA (n=6)



Note: Other VNAs validated include Cerner, Change Healthcare (McKesson), INFINITT, Intelrad, Philips, and Sectra.

Universal Viewer

Market Overall (n=95)
Agfa HealthCare (n=15)
Carestream (n=12)
GE Healthcare (n=11)
IBM Watson Imaging (Merge) (n=19)

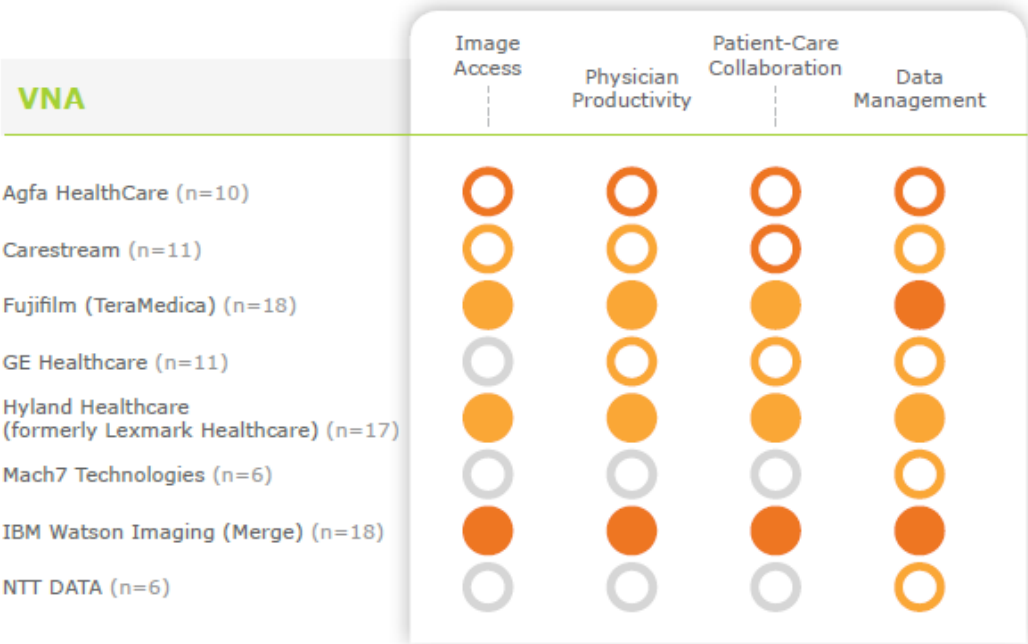


Note: Other universal viewers validated include Calgary Scientific, Cerner, Change Healthcare (McKesson), CoActiv, INFINITT, Intelrad, Karos Health, Philips, Sectra, Visage Imaging, and Vital.

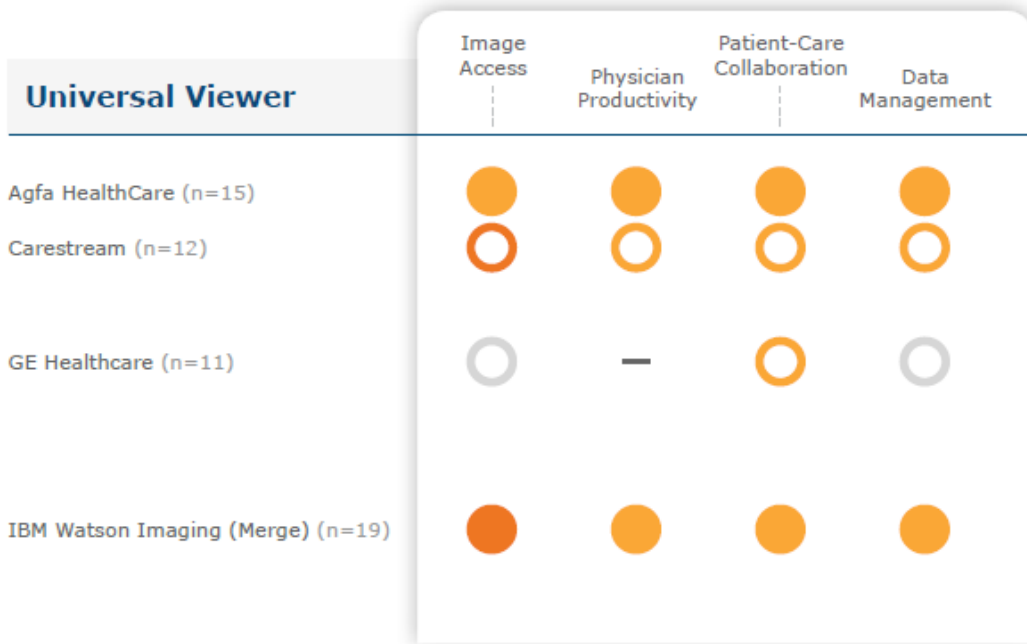
Where Are We Seeing Outcomes?

In What Areas Has Your VNA and/or Universal Viewer Helped You Improve?

75%+ 36%-74% 1%-35% — No Validations Limited Data



Note: Other VNAs validated include Cerner, Change Healthcare (McKesson), INFINITT, Intelrad, Philips, and Sectra.



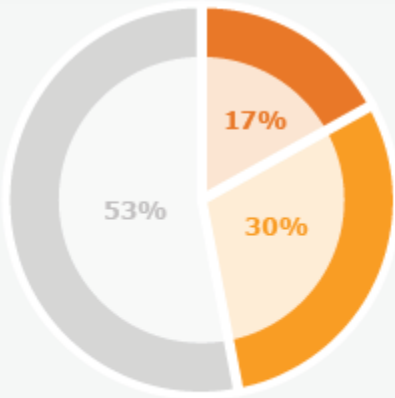
Note: Other universal viewers validated include Calgary Scientific, Cerner, Change Healthcare (McKesson), CoActiv, INFINITT, Intelrad, Karos Health, Philips, Sectra, Visage Imaging, and Vital.

Imaging AI

Organization Status with AI in Imaging

(n=81)

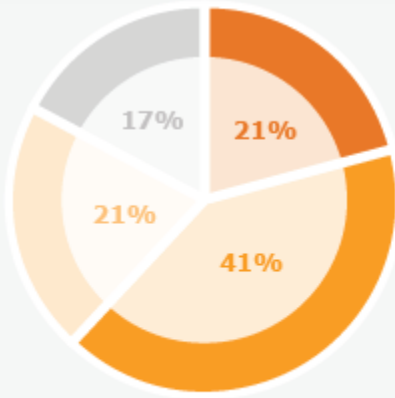
- Live/Piloting
- Have/Making Plans
- No Current Plans



When Do Organizations Making Plans Expect to Go Live?

(n=24)

- <1 Year
- 1-2 Years
- 3-5 Years
- 5+ Years



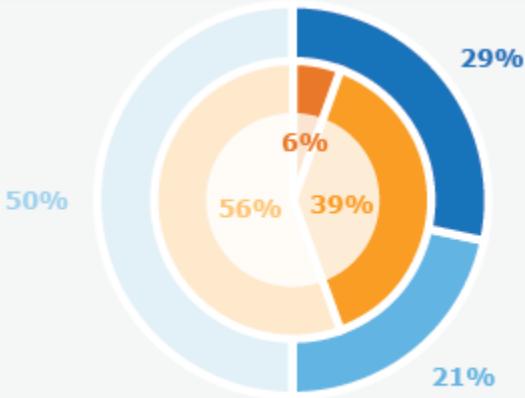
Depth of Adoption for AI in Imaging

Current Adoption (Live)
(n=14)

- High
- Moderate
- Low

Anticipated Adoption (Have Plans, Making Plans)
(n=18)

- High
- Moderate
- Low

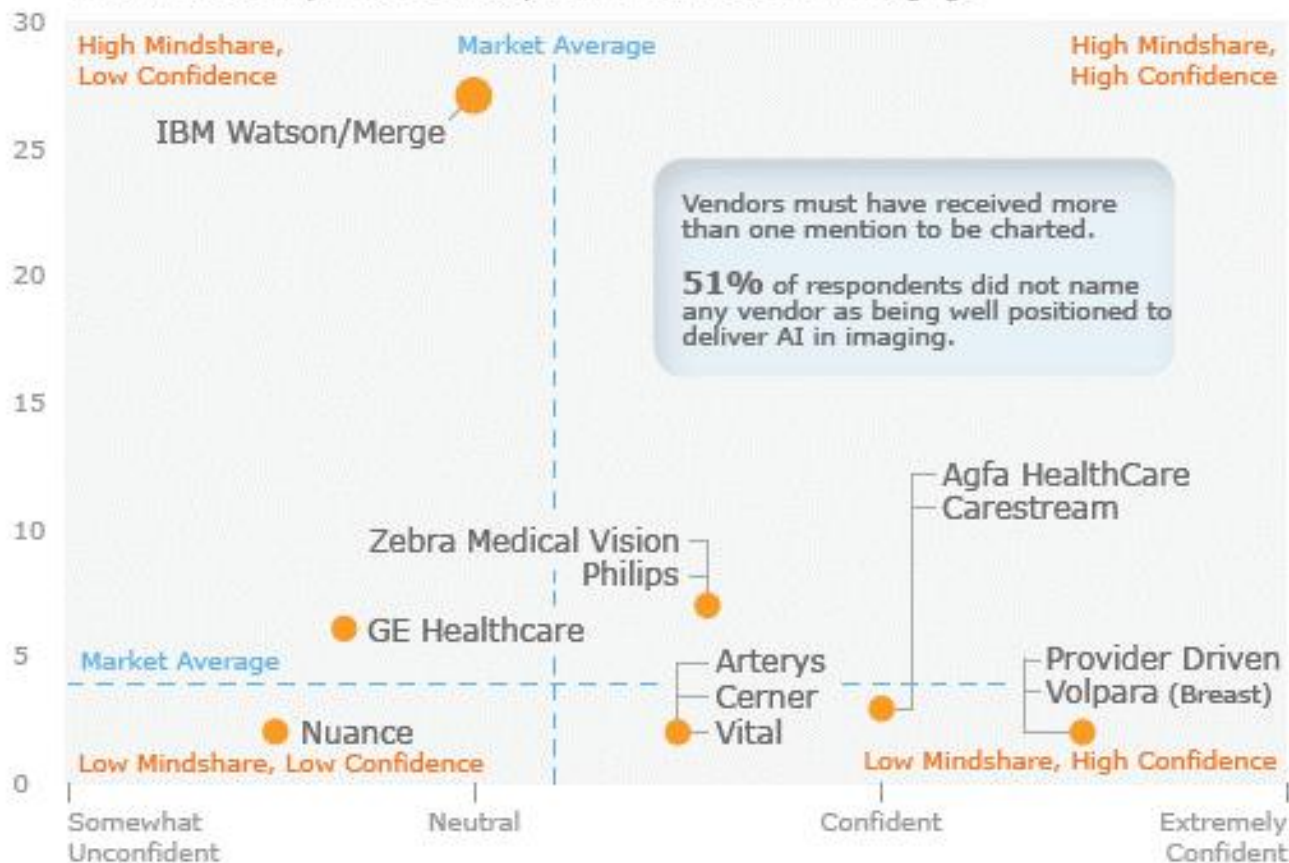


What Technology Vendors Will Lead?

Mindshare vs. Provider Confidence in Delivery

▼ Number of Mentions (n=40)

Which vendors do you feel are well positioned to deliver AI in imaging?

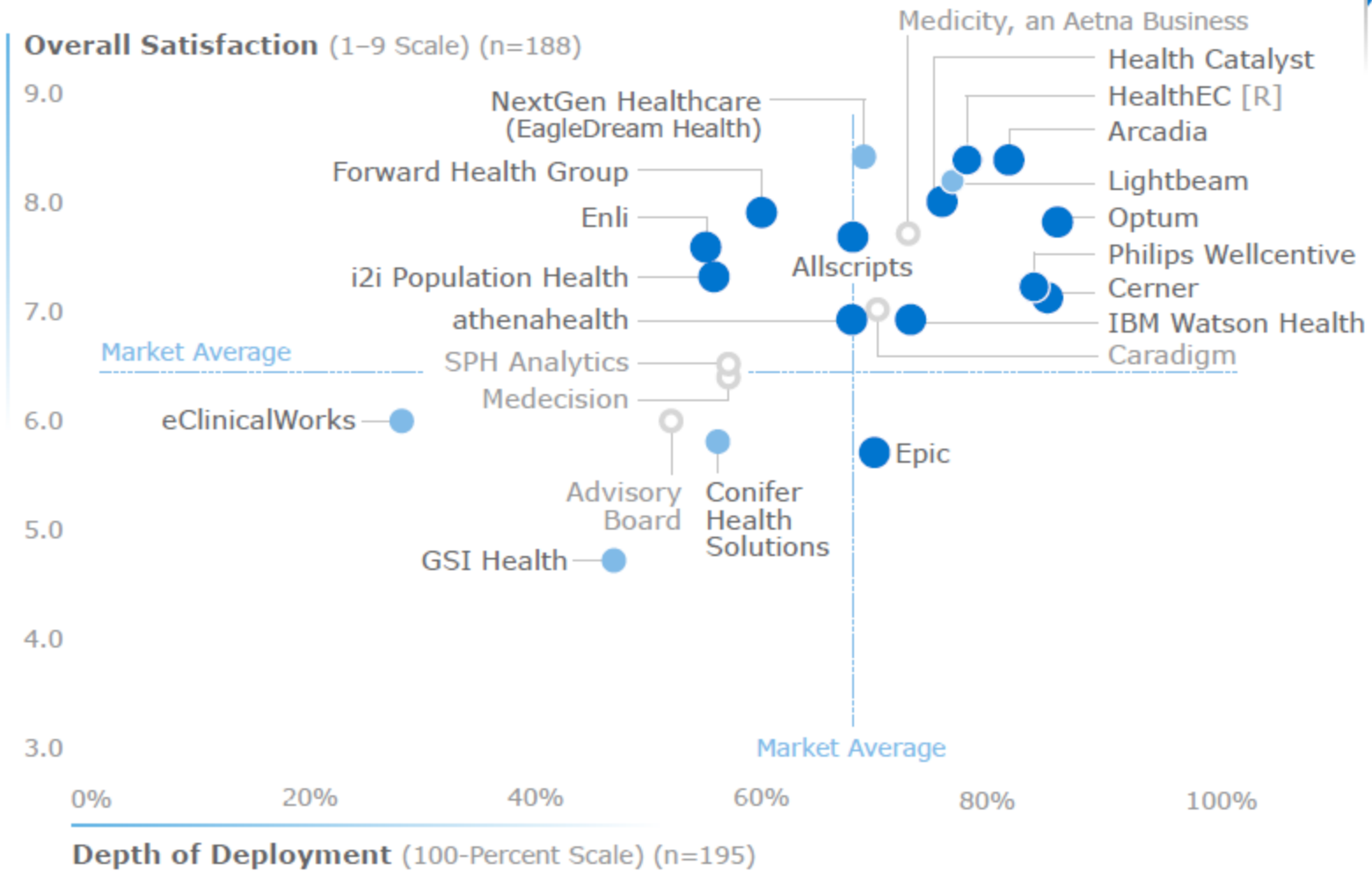


► Confidence in Delivery (n=40)

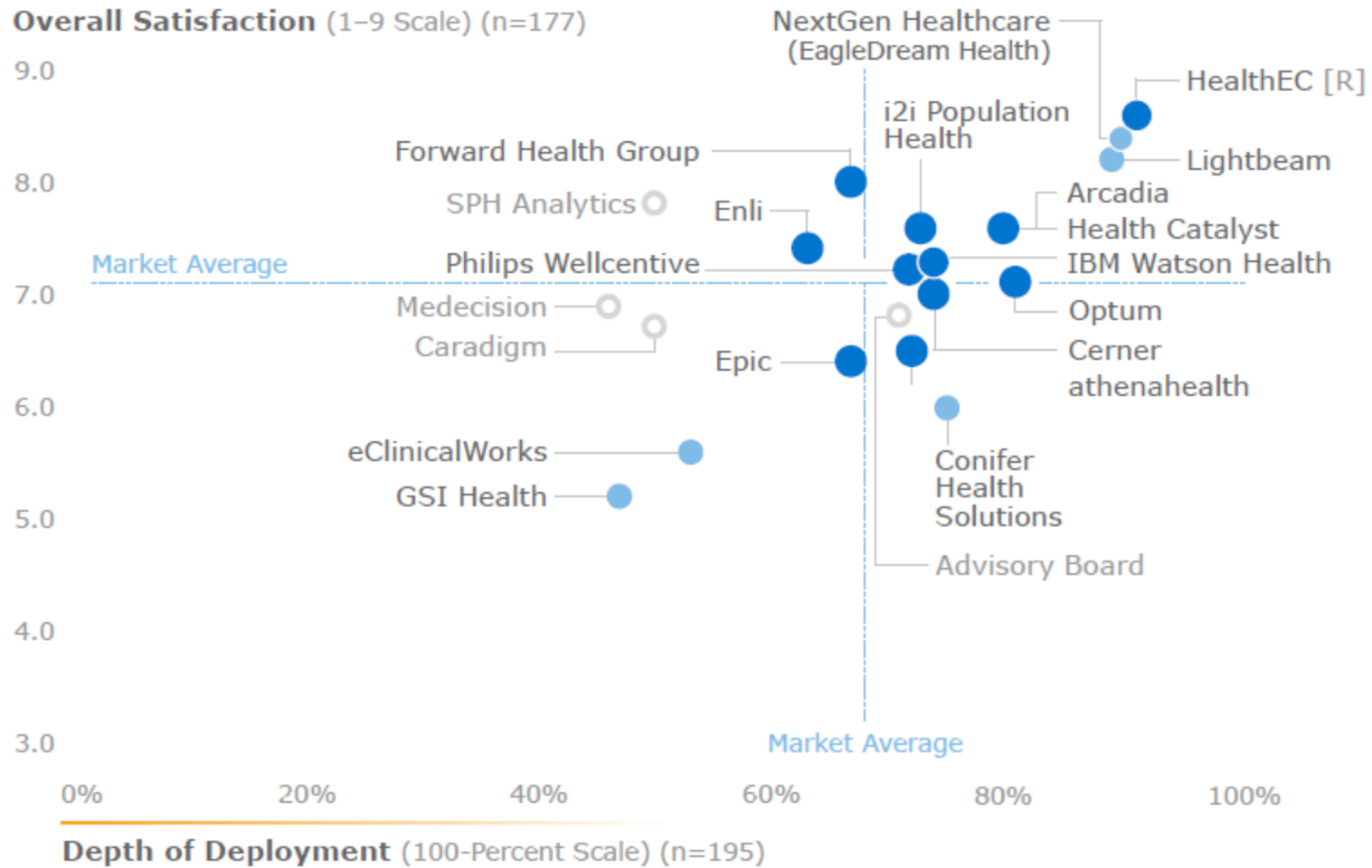
How confident are you in this vendor's ability to deliver AI in imaging?



1 Data Aggregation

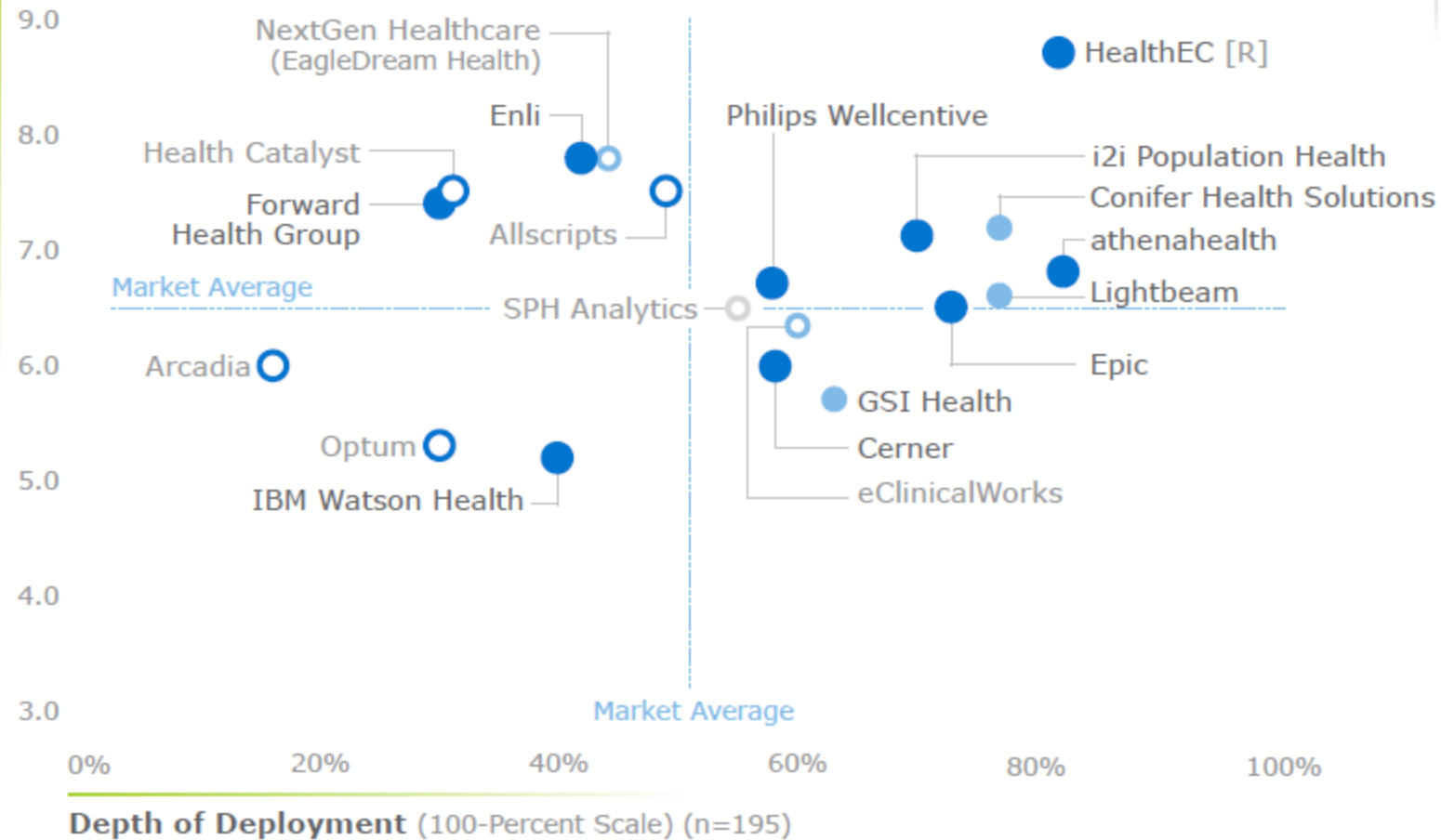


2 Data Analysis

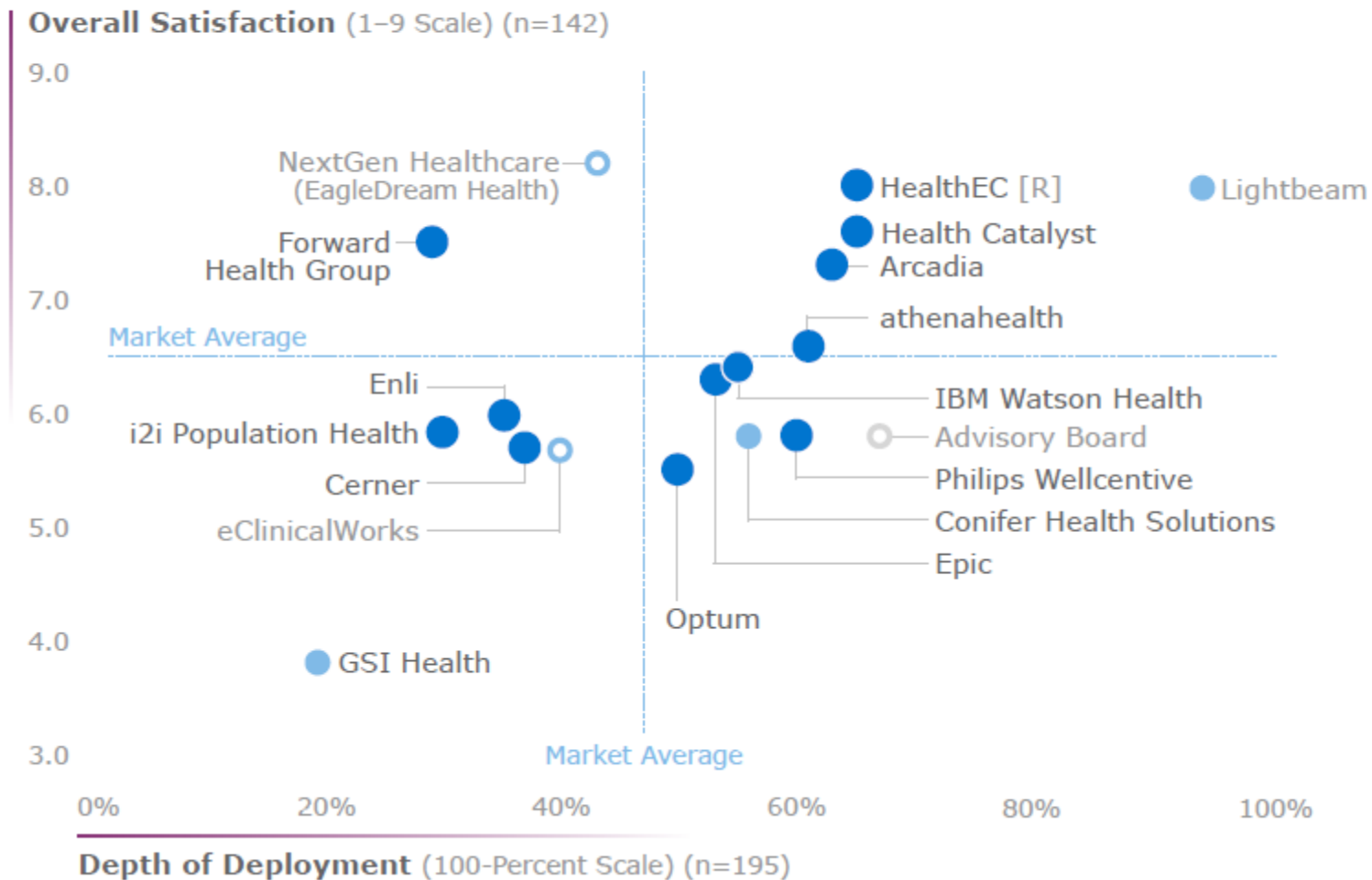


3 Care Management

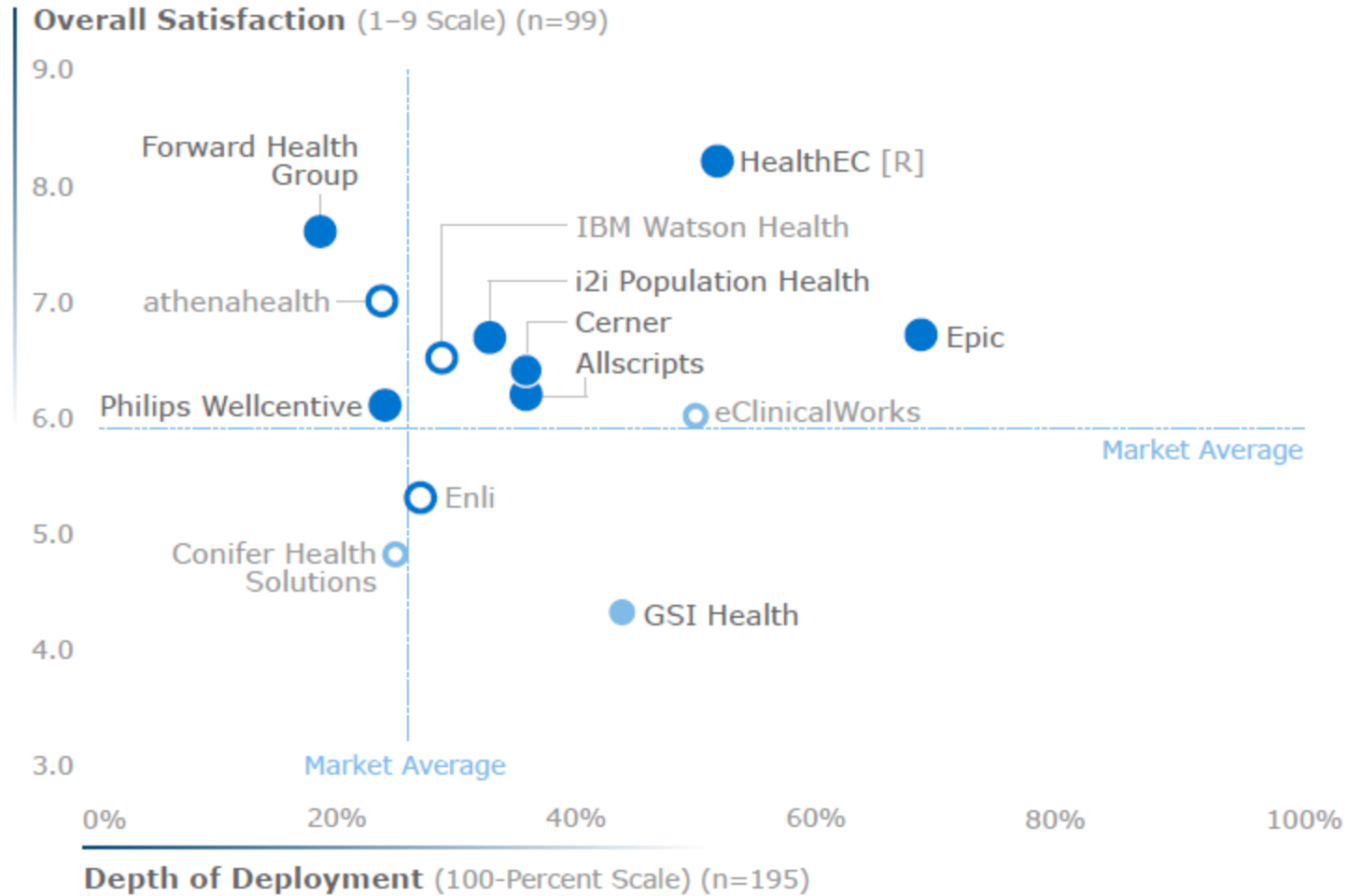
Overall Satisfaction (1-9 Scale) (n=133)



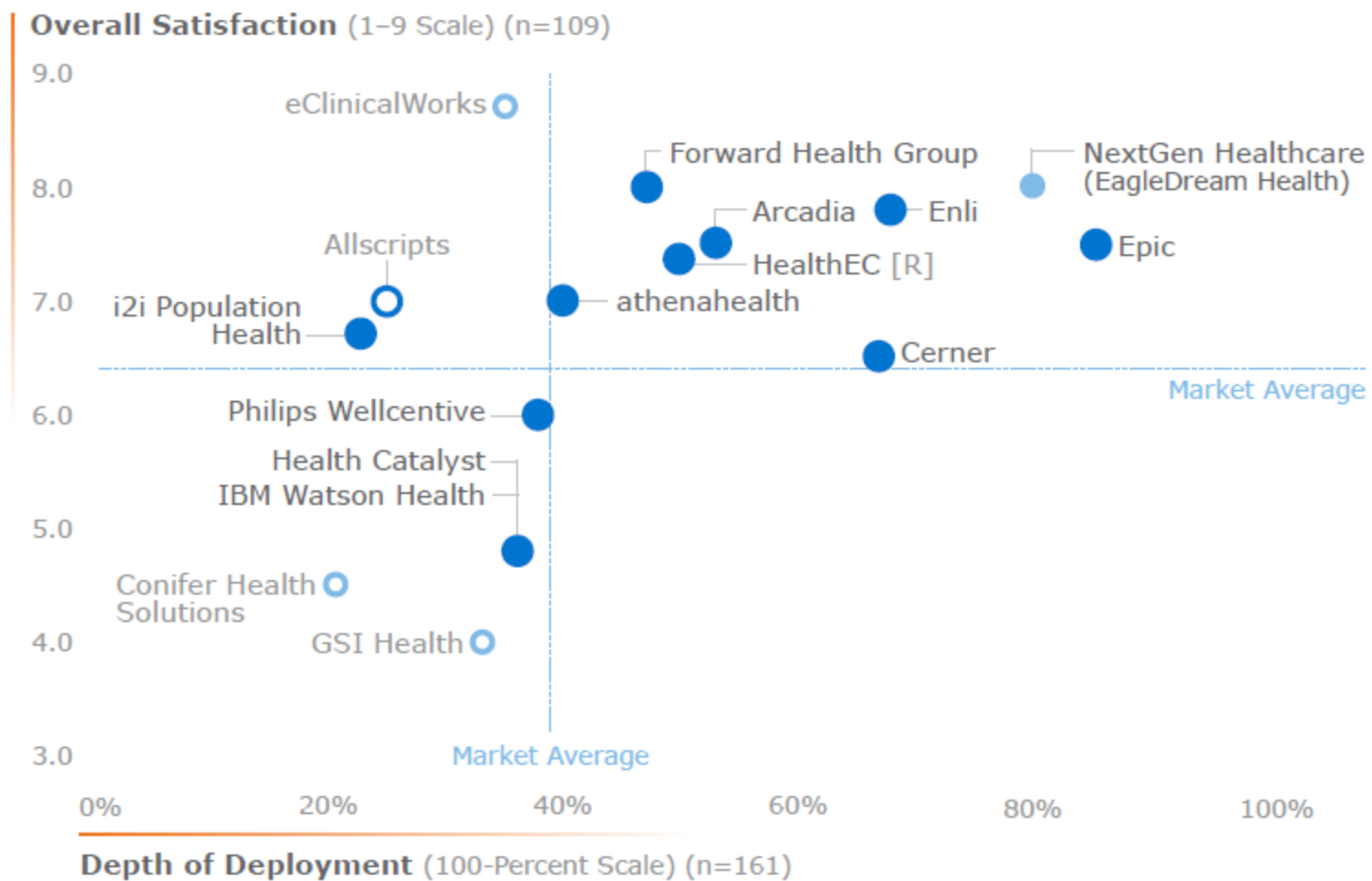
4 Admin/Financial Reporting

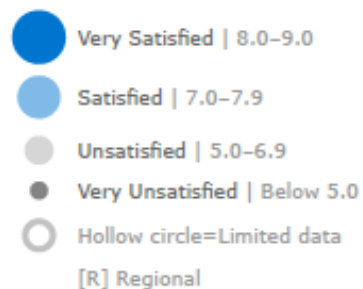


5 Patient Engagement



6 Clinician Engagement





Functionality Satisfaction by Population Health Management Vertical

Feedback was collected only from vendors' most deeply deployed customers.

		1 Data Aggregation	2 Data Analysis	3 Care Management	4 Admin/ Financial Reporting	5 Patient Engagement	6 Clinician Engagement	Overall Score
7+ Interviews								
Allscripts	(n=7)							79.3 (n=27)
Arcadia	(n=10)							85.8† (n=10)
athenahealth	(n=12)							83.3 (n=18)
Cerner	(n=13)							72.7 (n=15)
Enli	(n=10)							86.9 (n=22)
Epic	(n=12)							85.8 (n=41)
Forward Health Group	(n=8)							94.1† (n=9)
Health Catalyst	(n=9)							89.0† (n=9)
HealthEC [R]	(n=9)							94.2† (n=7)
i2i Population Health	(n=10)							86.0 (n=18)
IBM Watson Health	(n=7)							70.0 (n=22)
Optum	(n=8)							79.7 (n=21)
Philips Wellcentive	(n=12)							79.0 (n=19)



Top Strategies Provider Organizations Use to Manage Cost of Care

1



Human Capital Management & Workforce Optimization

Recruit, grow, and retain the right talent through the improvement of processes and business objectives related to workers and their skills. Optimize employee performance and productivity/utilization, including that of clinicians.

2



Supply Chain Improvement

Improve sourcing, procurement, and movement of medical supplies to end users, including patients. Also includes pharmaceutical formulary management and control.

3



Infrastructure & Operational Efficiency Improvement

Improve infrastructure and operational efficiency by lowering fixed costs, such as IT systems and facilities, or optimizing workflows and operational efficiency, such as revenue cycle transformation or registration-workflow enhancement.

4



Quality Management for Treated Patients

Achieve desired care outcomes and reduced costs by promoting patient education and safety, encouraging best practices, and better managing and predicting risk.

5



Utilization Management

Avoid unnecessary treatment/utilization by providing the right care in the right setting. Includes four facets: (1) case management, (2) population health management, (3) patient-level claims analytics, and (4) episodic claims analytics.

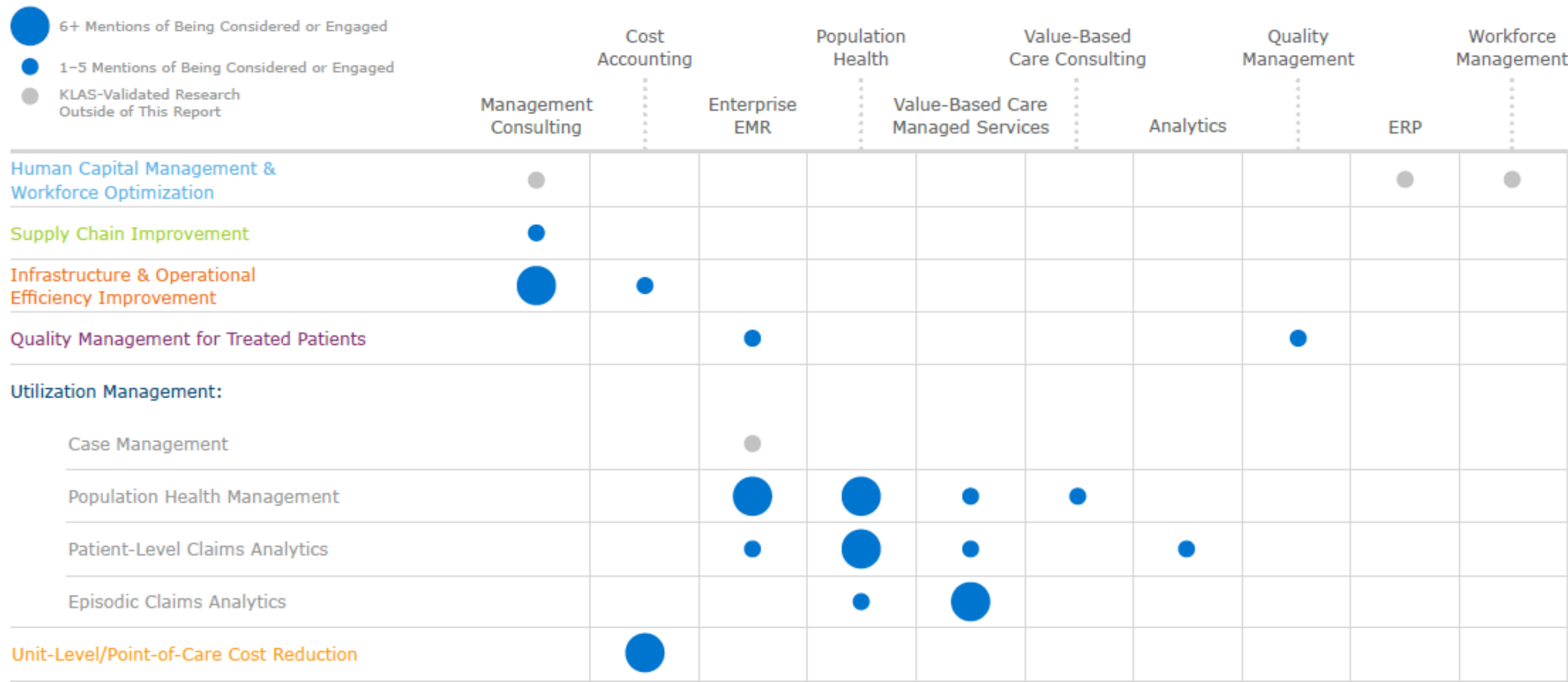
6



Unit-Level/ Point-of-Care Cost Reduction

Reduce direct but variable costs, such as supplies, and optimize the time and productivity of clinical resources across all unit levels, including facility, department, service line, location, clinician, and individual patient.

Types of Vendors/Firms Considered or Engaged for Cost of Care Strategies





Telehealth Virtual Care

What Virtual Care Visit Types Have Customers Validated?

Percent of Customers Who Reported the Capability

■ 1%–24% ■ 25%–49% ■ 50%–100%

		Scheduled/ Patient-Focused	On-Demand/ Consumer-Focused	Telespecialty Consultations
American Well	(n=20)	11	16	5
InTouch Health	(n=18)			18
Limited Data				
Avizia	(n=12)	4	4	10
Carena	(n=6)		6	
Epic	(n=11)	8		4
swyMed	(n=11)			11
TruClinic	(n=8)	4		6
VSee	(n=6)	1	2	5
Zipnosis	(n=9)	4	6	
Other Notable Vendors				
MDLIVE	Often considered by healthcare organizations, MDLIVE and Teladoc focus primarily on outsourced provider network services and KLAS has yet to validate enough customers using their virtual care platform to merit inclusion in this report.			
Teladoc				

Note: "n" represents number of unique organizations that answered the question

Telehealth: Where is the Integration?

Integration Status

 Bidirectional Integration

 Unidirectional Integration

 No Integration

American Well (S/O/T)



InTouch Health (T)



Limited Data

Avizia (S/O/T)



Carena (O)



Epic (S/T)



swyMed (T)



TruClinic (S/T)



VSee (S/O/T)

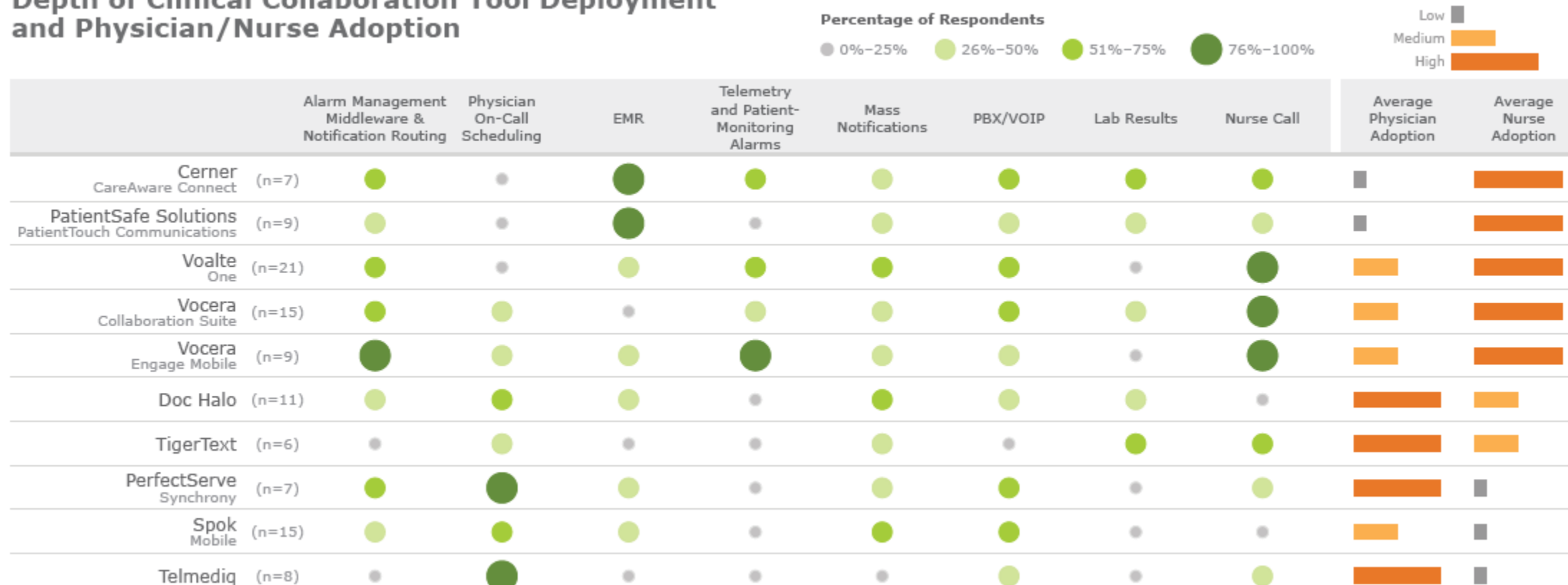


Zipnosis (S/O)



Secure Messaging

Depth of Clinical Collaboration Tool Deployment and Physician/Nurse Adoption



Patient Communications

Patient Communications Solution Breadth



	Patient communications areas (not tools)	Overall Score	Appointment Reminders		Care Reminders		Two-Way Communication		Vendor Highlights
			Scheduling/Rescheduling		Payment Reminders		Medication Refill Requests		
CipherHealth (n=17)	91.5								Valued most for post-discharge follow-up and for connecting with clinicians.
Solutionreach (n=22)	90.5								Primarily appointments. Adding care reminders, two-way texting.
Talksoft (n=18)	87.3								Appointment reminders, mainly voice calls. Some payment reminders.
Emmi (n=19)	87.1								Delivers targeted patient education pre- and post-procedure.
West (TeleVox) (n=16)	77.7								Appointment reminders. Upgrade to texting is a major plus for some.
Limited Data									
HealthGrid (n=7)	91.1								Proactive outreach tools push clinical and administrative content.
Phytel (n=8)	80.9								Aggregates and analyzes patient data to target care gaps for closure.

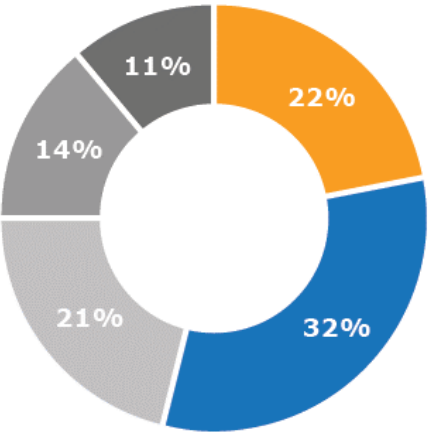


athena Inpatient

Implementation Status for Customers Contracted in 2015/2016

(n=28)

- Recently Implemented on Time
- On Pace for Go-Live
- Delayed
- Canceled Contract
- Recently Implemented, Replacing



athenahealth Performance—by Job Area

Overall Score
(100-Point Scale)

*Limited Data

Strength of Hospital Solution
(1-9 Scale)

EMR Inpatient-Outpatient Integration RCM Limited Data

Executives

(n=10/7) **87.6***



IT Professionals

(n=5/5) **83.0***



End Users

(n=11/7) **64.0***

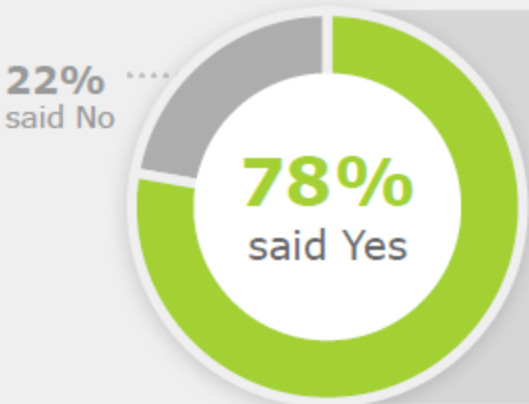


(n=# of respondents/
of organizations)

MEDITECH at a Glance: Where Is Progress Being Made?

† This overall score is Below Confidence. "Below Confidence" is a term reserved for overall performance scores that do not meet the minimum KLAS Confidence level of 15 unique organizations.

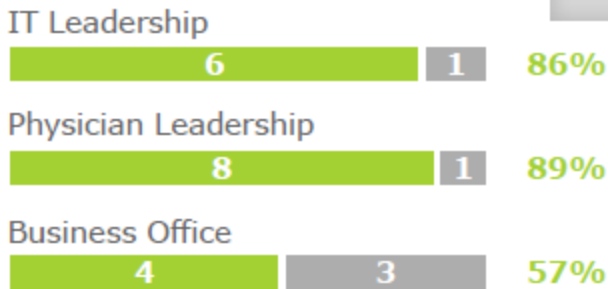
Is MEDITECH Making the Progress You Expect?



(n=23 respondents/15 organizations)

By Job Role

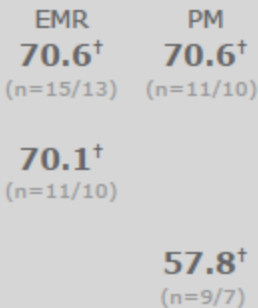
Yes No



0% 100%

Overall Scores

(n=respondents/organizations)



How Complete Is Web Ambulatory Today?

80%–100% Complete
61%–79%
41%–60%
21%–40%
0%–20%



0% 100%



Customers forecast a 25%–30% jump in satisfaction next year.

KLAS® REPORTS 2017

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Early Ambulatory Market Comparison

EMR & PM (11+ Physicians) (100-Point Scale)

Overall Score Comparison Key

MEDITECH Score
Limited Data

Highest Performing Vendor Score
Lowest Performing Vendor Score

Market Average

MEDITECH's ratings are initial customer ratings one year after Web Ambulatory's launch. As other products have been available for years, the comparison is not apples to apples.

EMR



MEDITECH's initial EMR performance is ahead of Allscripts, eClinicalWorks, NextGen Healthcare, and GE Healthcare, and lags behind Epic, athenahealth, and Cerner.

PM



KLAS Decision Insights



The 2018 A-List

Vendor With (1) Market Energy, (2) Happy Customers and (3) Retained Customers



ERP has historically been considered a market with "few good options." Workday is quickly changing that perception. While Workday's ERP solution is not as functionally complete as other established solutions, **their focus on customer needs and continuing innovation has customers satisfied.**

SECTRA

Sectra offers a Best in KLAS PACS solution that is functional and easy to use. While the software is good, the support is better—**customers regularly report that the vendor provides the best support experience they have ever had.**

Carestream

Carestream offers **one of the most well-rounded PACS solutions on the market**, with strong functionality, support, and ease of use. Carestream's high-performing universal viewer and VNA contribute to customers' overall satisfaction and high retention.



Health Catalyst continues to show healthcare vendors and providers alike that data has the power to create change. Health Catalyst **customers consistently report strong outcomes, even saved patient lives**, driven by Health Catalyst's strong software and, even more importantly, their guidance in creating change.

mModal

MModal offers highly rated speech recognition, documentation, and transcription solutions. **Customers often report that these solutions help them achieve desired outcomes without going over budget.** This focus on high value combined with quality, easy-to-use software makes MModal a vendor that customers keep.

Epic

Epic has one of the most consistent track records in all of healthcare, with a broad integrated suite of products and **a powerful focus on listening to and delivering to customer needs.**



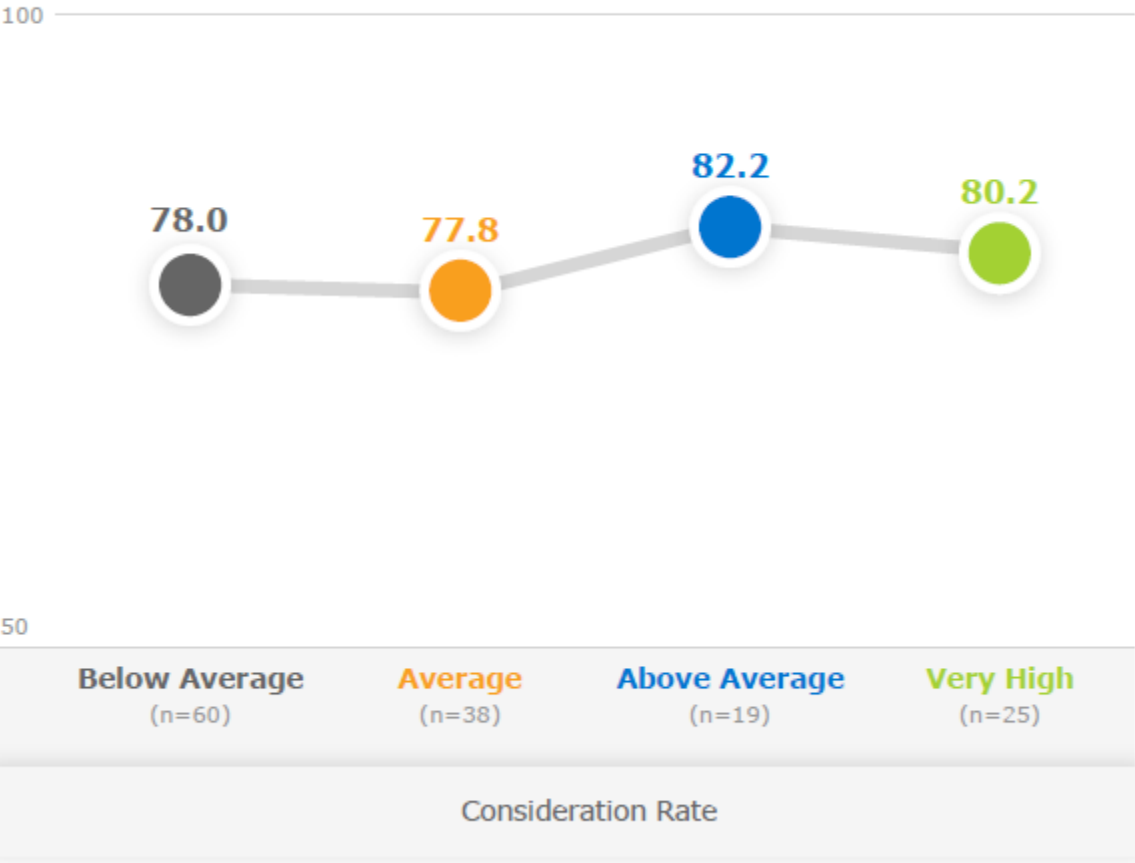
Most widely known for their integration and HIE solutions, InterSystems also offers a high performing EMR (sold outside North America). Customers report that InterSystems **combines a strong focus on customers' best interests with software that does what is needed.**



Widely recognized and adopted, Nuance offers a broad portfolio of speech, CDI, coding, and even diagnostic imaging solutions that all boast above average satisfaction. **Customers praise Nuance's focus on continued innovation and solid support.**

Who Do You Consider?

Overall Satisfaction—by Consideration Rate
(100-Point Scale)



Who Do You Select?

Vendor KLAS Score vs. Win Rate[†]

▼ Win Rate [†]Vendor Win Rate = Percentage of considerations in which vendor was selected or is the likely choice.

Performance and win rate data as of February 15, 2018

