2012 HL7 Interface Technology Survey Results

The 2012 HL7 Interface Technology Survey Results provide a current view of the HL7 interface market within healthcare. These survey results topics include technology, organizational priorities, meaningful use preparedness, and perspectives on interface engine vendors. The survey results are presented from the key perspectives – CIO/CTOs, IT Managers, and HL7 professionals.

The survey results present a summary of the data collected during a 14 day period in August 2012 open to all participants through our website, www.corehealthtechnologies.com. We encouraged participation with email invitations and through various social media outlets.

Over 1,350 individuals participated in this survey. All participants live and work in the United States and are employed by healthcare organizations, predominantly providers, using HL7 interfaces.

Observations by Core Health Technologies

- ***HL7 Professionals have strong experience, but low tenure.*** Of the HL7 professionals participating in this survey, 60% have 10+ years of experience within healthcare. We see an interesting contrast the strength of their experience the fact that 48% of the these respondents have less than 3 years tenure in their current organization.

- ***Interface engine usage is diverse.*** While Cloverleaf stays the leader in market share, we continue to see many engines being used. One interesting observation is that the Oracle/Sun/SeeBeyond product line of DataGate, e*Gate, ICAN, and JCAPS has declined pretty significantly over the last three years, from 34% in 2010, passing through 17% in 2011, and now rating around below 7% in 2012.

- ***Potential to improve with current interface engine.*** Nearly half of all respondents (49.5% of CIO/CTOs, 46.6% of IT Managers and 42.7% of HL7 professionals) state that while they are utilizing their interface engine for what it was initially intended, they know it has more capability they are not using.

- ***Lack of organization-wide awareness of key industry initiatives.*** As expected we see organizations achieving and advancing toward Meaningful Use. One potentially concerning statistic is that 31% of HL7 professional respondents claim they do not know their organization's preparedness to achieve Meaningful Use. An additional 4% stated they didn't know what meaningful use is.

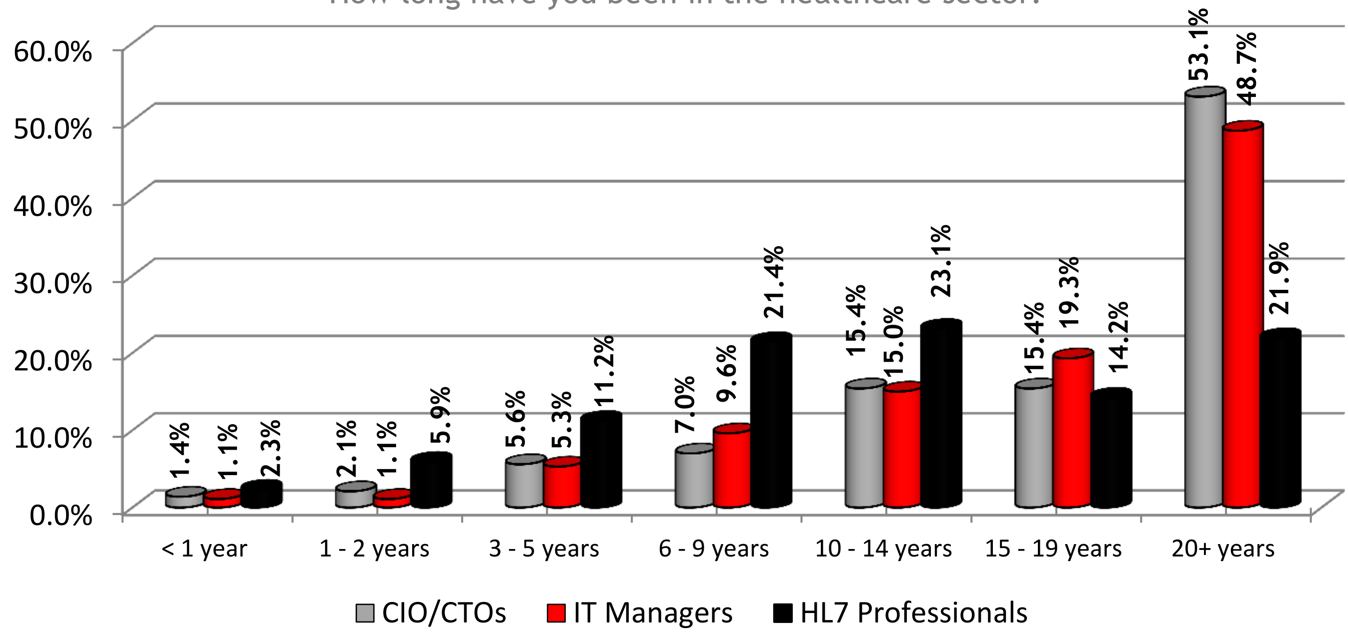
- ***Security is important, but not a top organizational priority.*** The answers to security questions woven throughout the survey indicate that while the category of "information security" is not a stand-alone organizational priority, it is part of everything an organizations does. Only 2% of respondents stated information security was one of their top 3 priorities. At the same time, when asked how information security affects their top priorities, 89% of CIOs and 90% of IT Managers stated that information security is either integral to at least one their organization's top priorities, or it is their top priority.

- ***Healthcare Integration continues to be integral to every organization and increasing in activities.*** 90% of CIO/CTOs, 91% of IT Managers, and 90% of HL7 Professionals responded that integration was either the top priority, integral to a top priority, or integral to all their priorities. Healthcare integration activity also continues to be heavy. Over 60% of each respondent stated their integration activities will increase over the next 12 months. Less than 10% of respondents stated healthcare integration activities will decrease at all.

- ***Lack of staff retention strategy.*** About 1/3 of all organizations currently do not have a staff retention strategy and another 23%+ do not have strategies but are currently working on them. While anecdotal, we question whether that the lack of retention strategies and low organizational tenure of HL7 professionals could be connected.

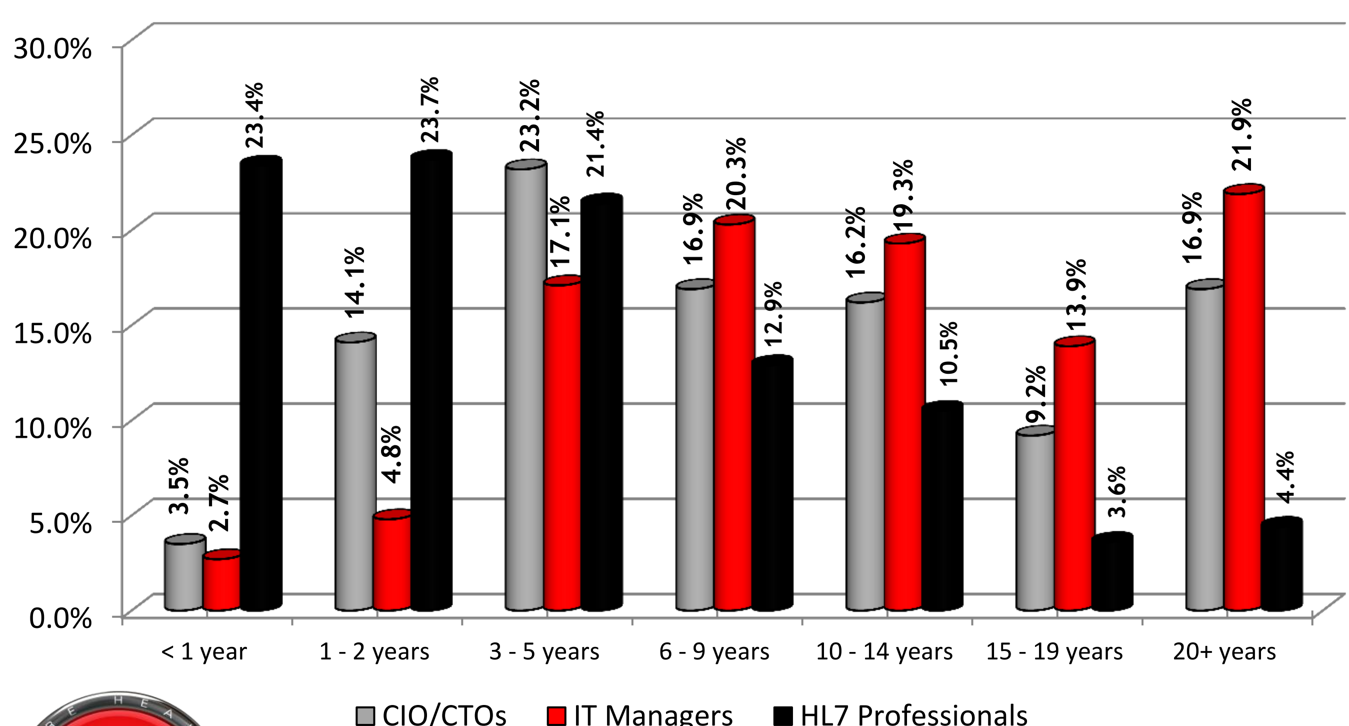
Tenure in Healthcare

How long have you been in the healthcare sector?



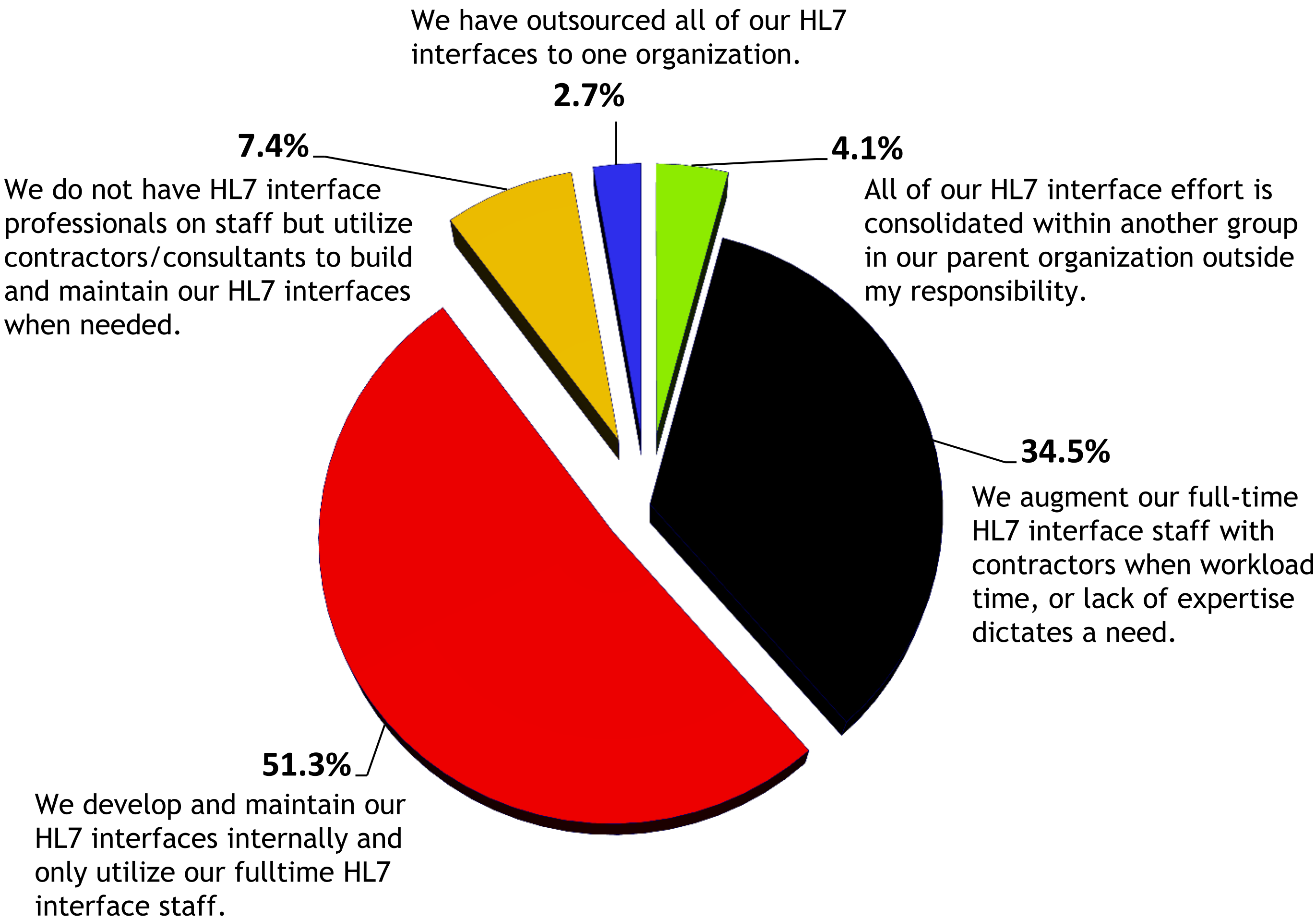
Tenure in Organization

What is your tenure within your current organization?



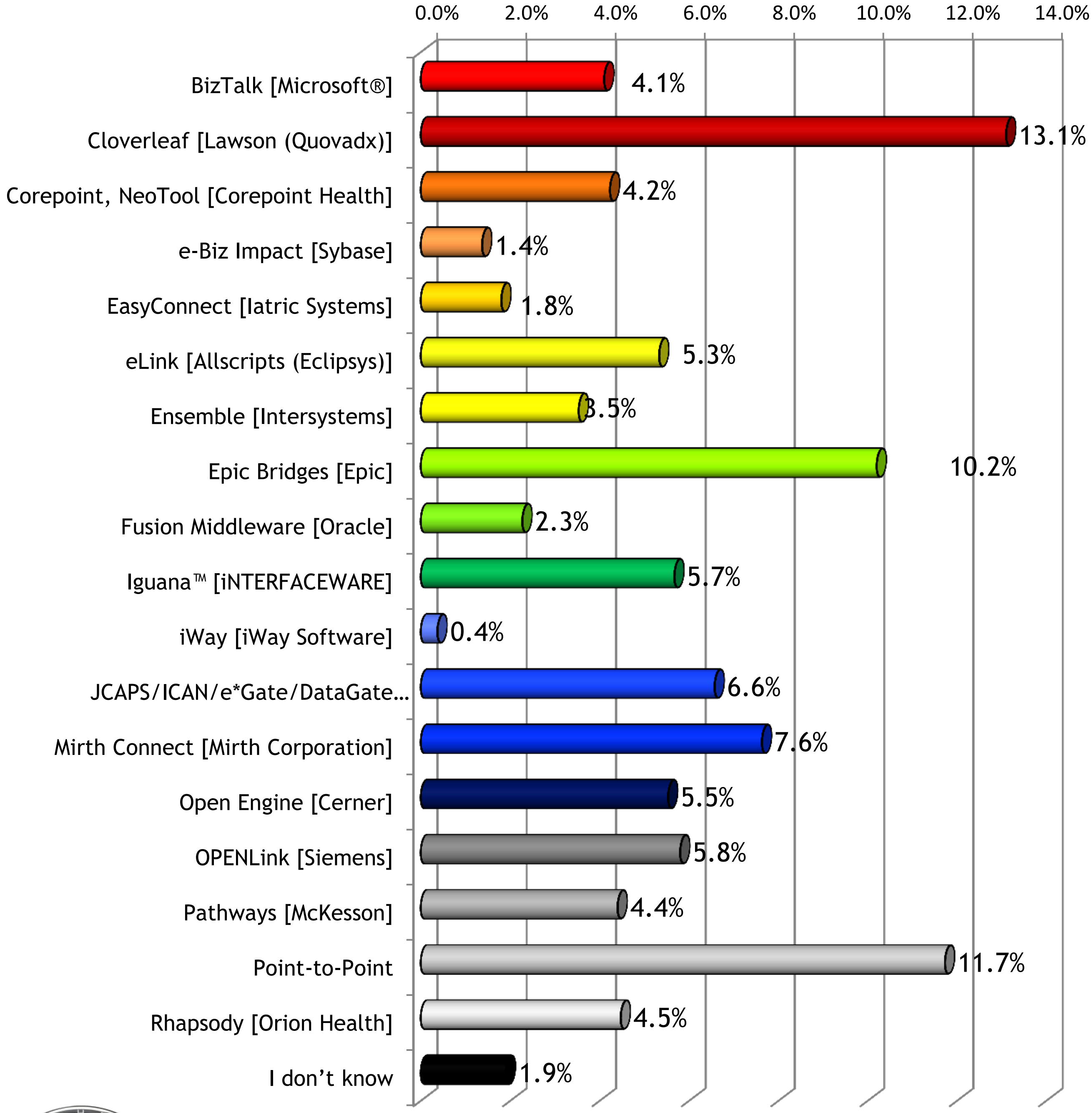
Employment Preference

Which best describes your organization's HL7 employment preference?



HL7 Technologies

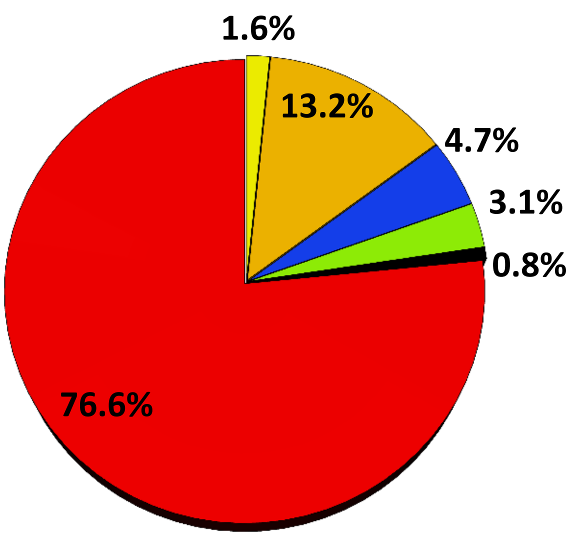
Select all specific HL7 interface technologies which your organization utilizes



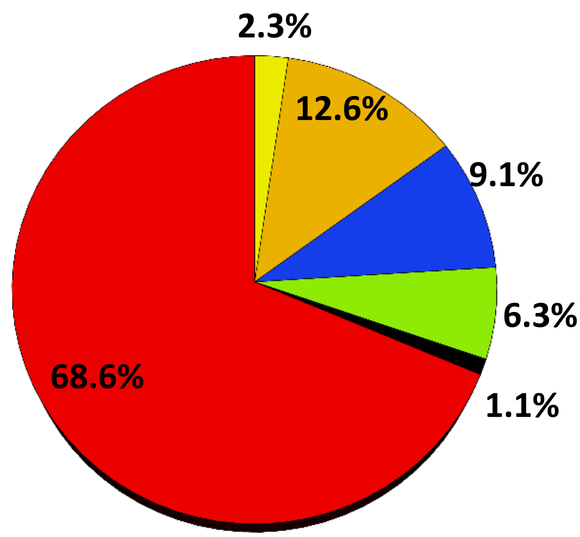
Current Interface Engine Status

How would you best describe your current status of interface engines?

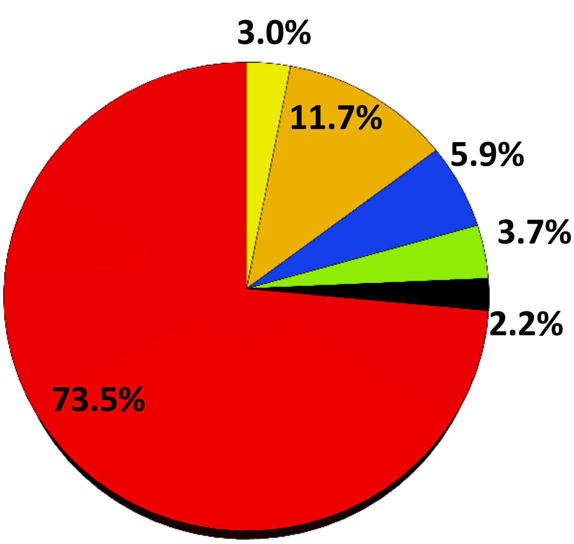
CIOs/CTOs



IT Managers



HL7 Professionals

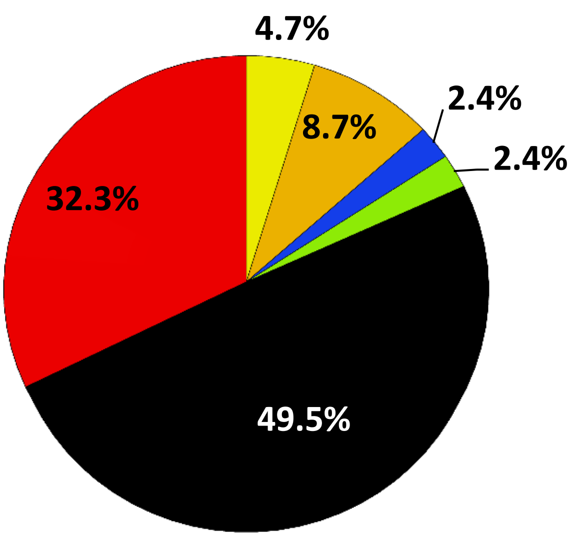


- We plan to stay with our current vendor and will upgrade as appropriate
- We have decided to change to a new interface engine but have not selected the engine
- We have selected a different interface engine but have not started the process to change
- We are currently in the process of changing to a different interface engine
- We are actively considering our options
- We have recently completed a change to a new interface engine

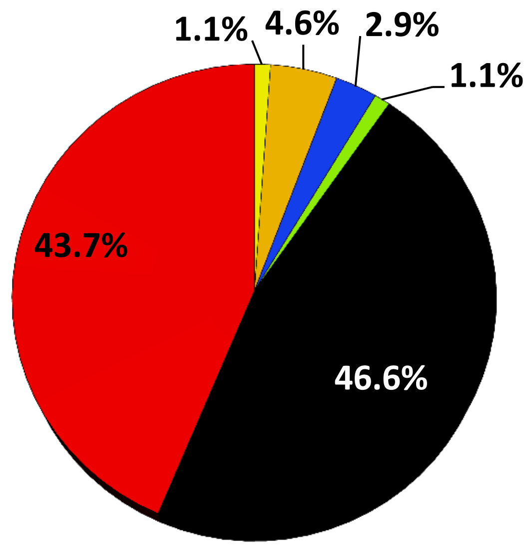
Interface Engine Utilization

To what degree is your organization utilizing your interface engine(s)?

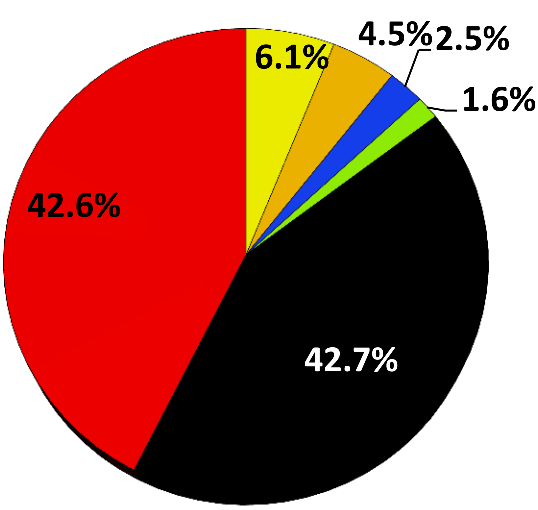
CIOs/CTOs



IT Managers



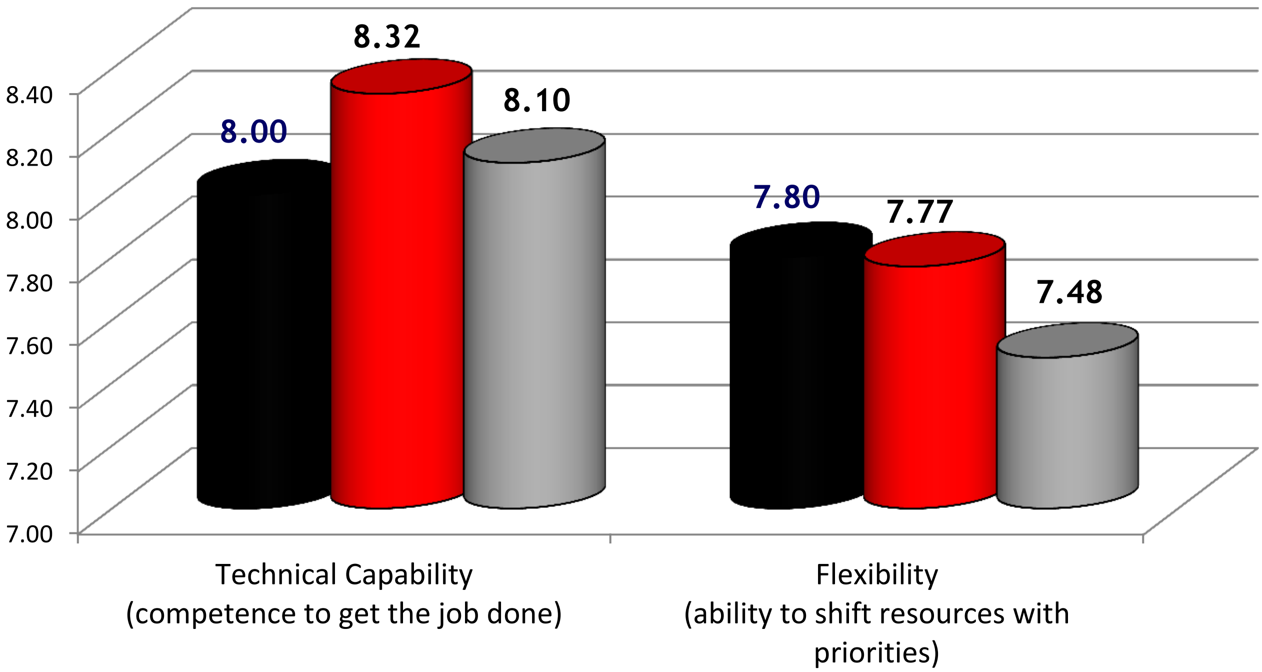
HL7 Professionals

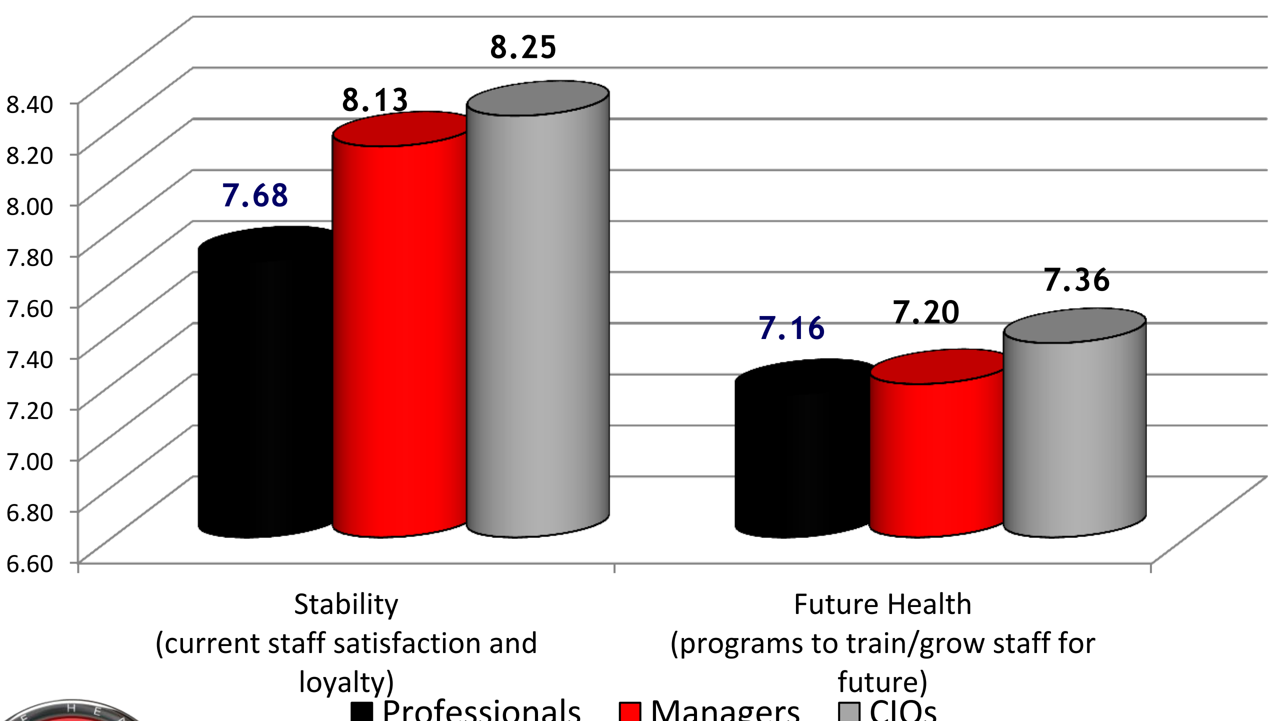


- (Red) We are utilizing our interface engine effectively and to its fullest capability
- (Black) We are utilizing our interface engine effectively for what we initially intended, but know there is more capability that we are not using
- (Green) We have not achieved our initial utilization objectives and have exceeded our timeline
- (Blue) We are using our interface engine, but I am not aware of the full product capability
- (Orange) We are still in our initial implementation of this interface engine
- (Yellow) I am not aware of the degree to which we utilize our interface engine

Integration Team Health

Please rate the health of your current integration resources for the following:
(1 = poor; 10 = superior)

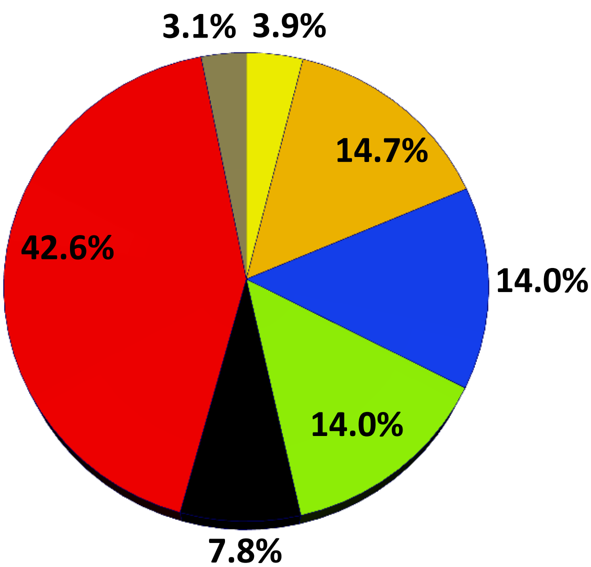




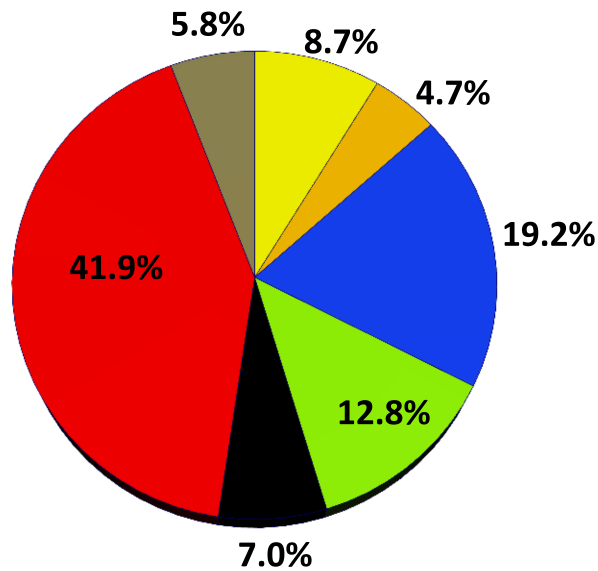
Meaningful Use Preparedness

How well is your organization prepared to achieve Meaningful Use and the associated financial incentive?

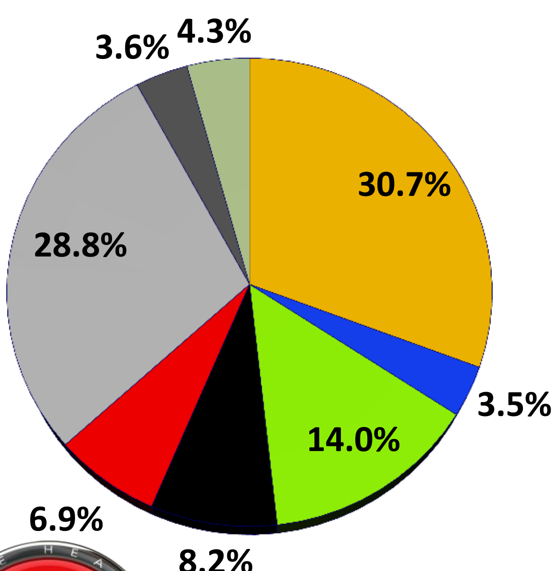
CIOs/CTOs



IT Managers



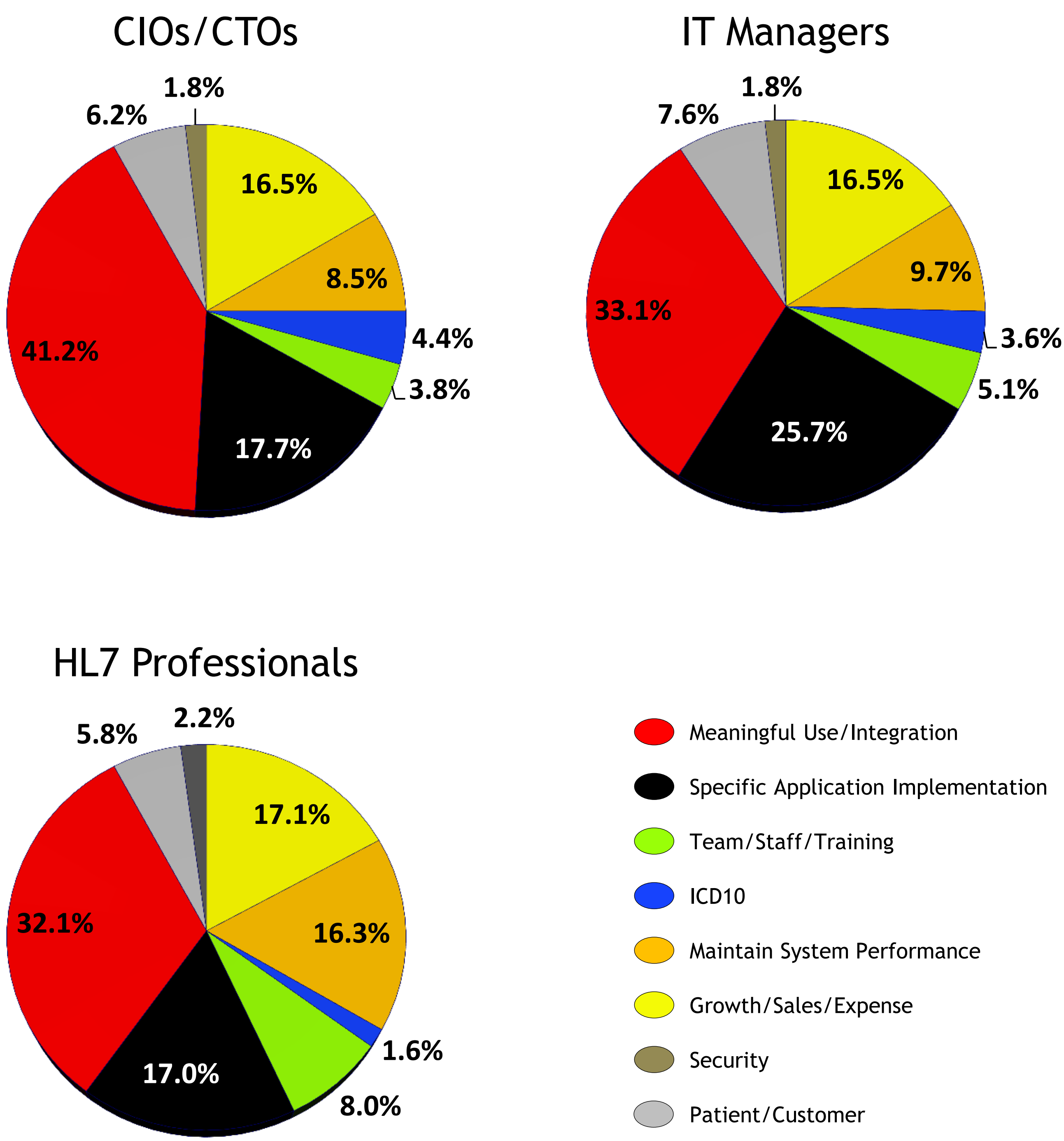
HL7 Professionals



- We have achieved Phase 1
- We do not have a current milestone set and it is not a current priority
- We are currently on track for Phase 1 certification in 2013.
- We are currently on track for Phase 1 certification in 2012.
- We are currently in the ONC certification process for Phase 1
- I do not know
- We do not have a current milestone set but it is a priority
- I do not know what MU is

Organizational Priorities

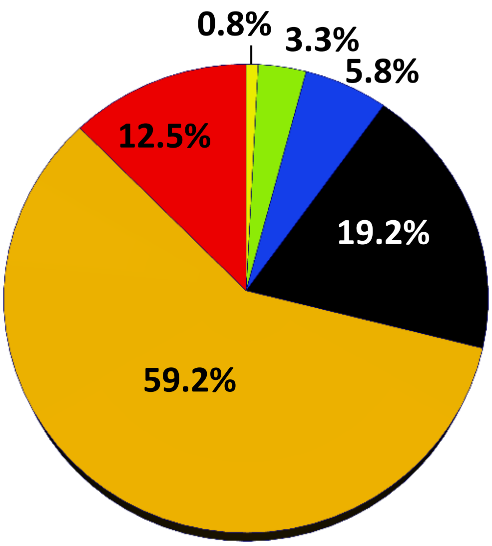
What are the top three priorities/objectives for your organization this year?



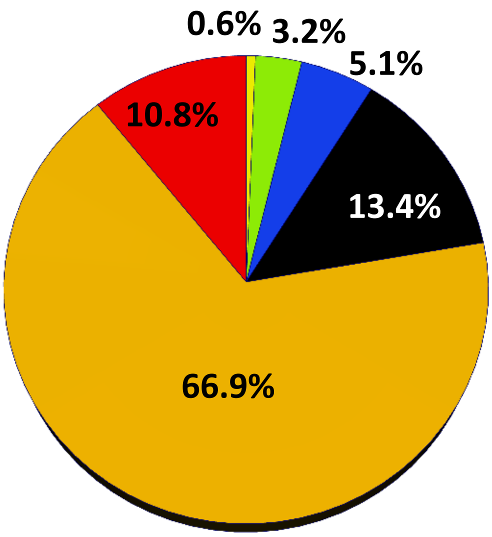
Healthcare Integration Impact to Priorities

How does "healthcare integration" affect your priorities/objectives?

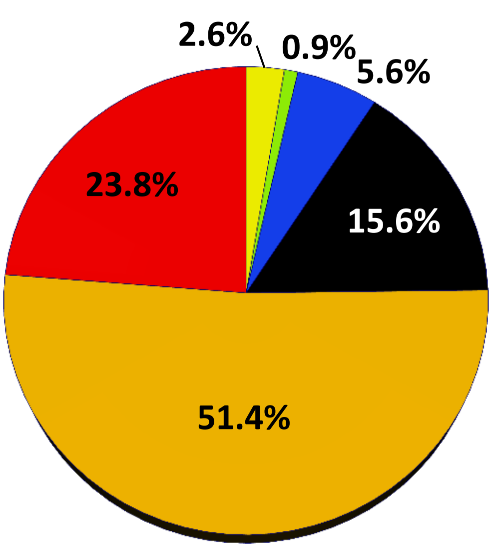
CIOs/CTOs



IT Managers



HL7 Professionals

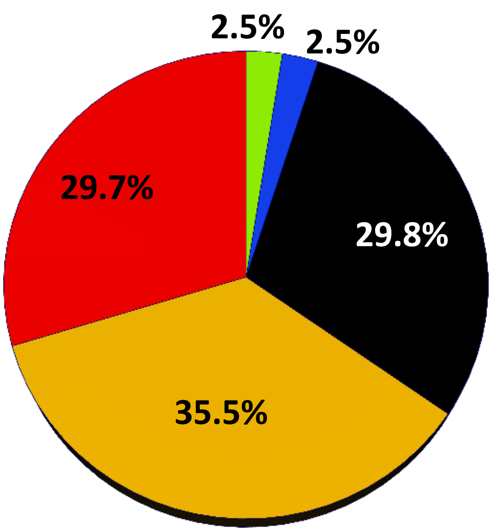


- Integration is our top priority
- Integration is integral to at least one of our priorities
- Integration is integral to all of our priorities and cannot be separated
- Integration has little effect on us achieving our top priorities
- Integration has some effect on us achieving our top priorities
- Integration has no effect on us achieving our top priorities

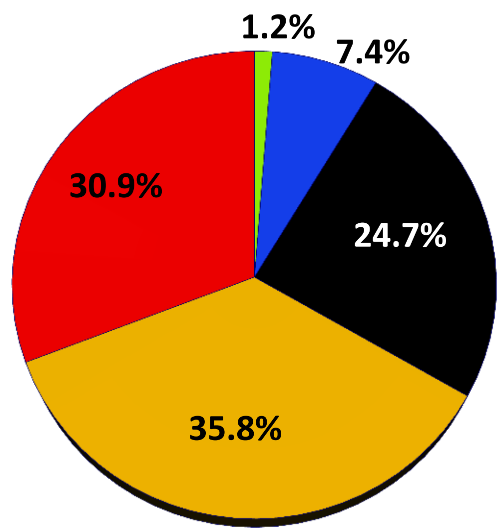
Integration Activity Outlook - Next 12 Months

Looking forward to the next 12 months, how will your HL7 integration activities compare with the past 12 months?

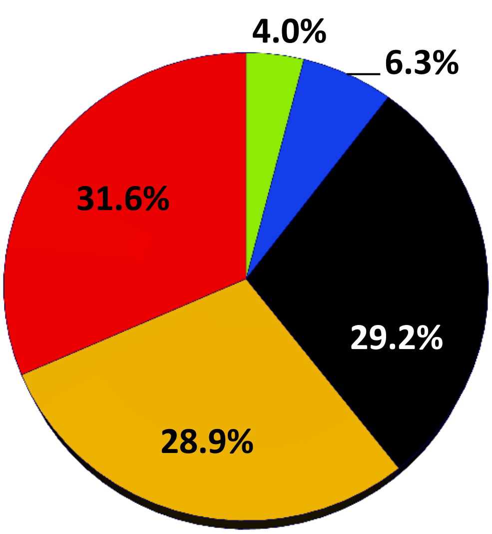
CIOs/CTOs



IT Managers



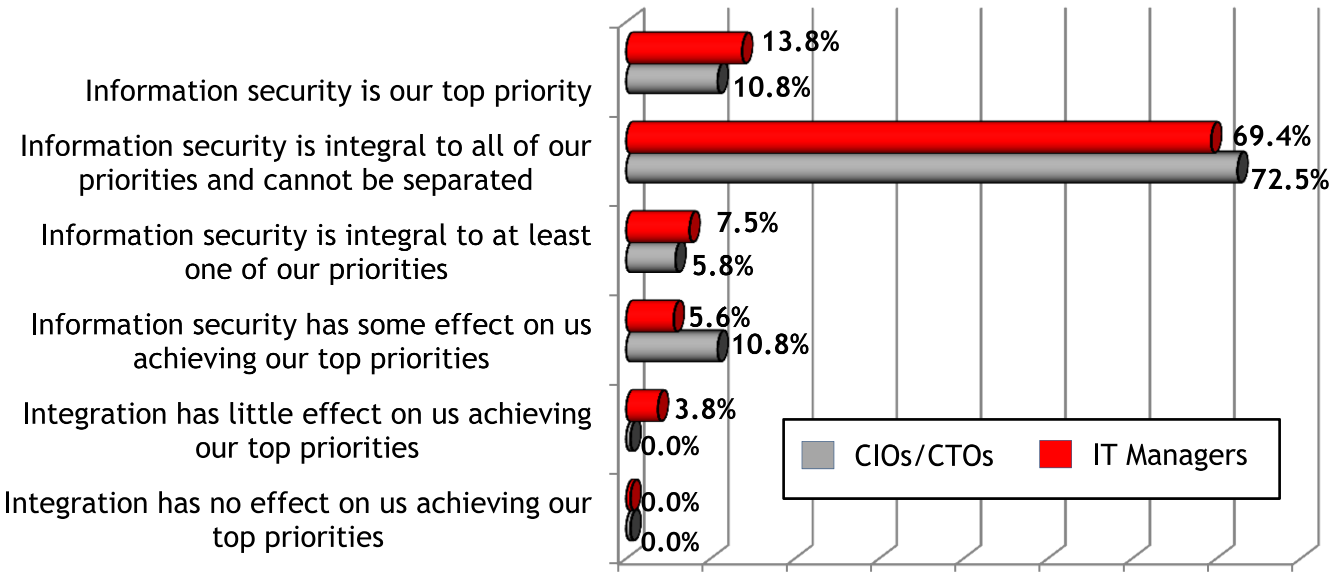
HL7 Professionals



- Our integration activities/efforts will decrease significantly
- Our integration activities/efforts will decrease slightly/moderately
- Our integration activities/efforts will stay the about the same
- Our integration activities/efforts will increase slightly/moderately
- Our integration activities/efforts will increase significantly

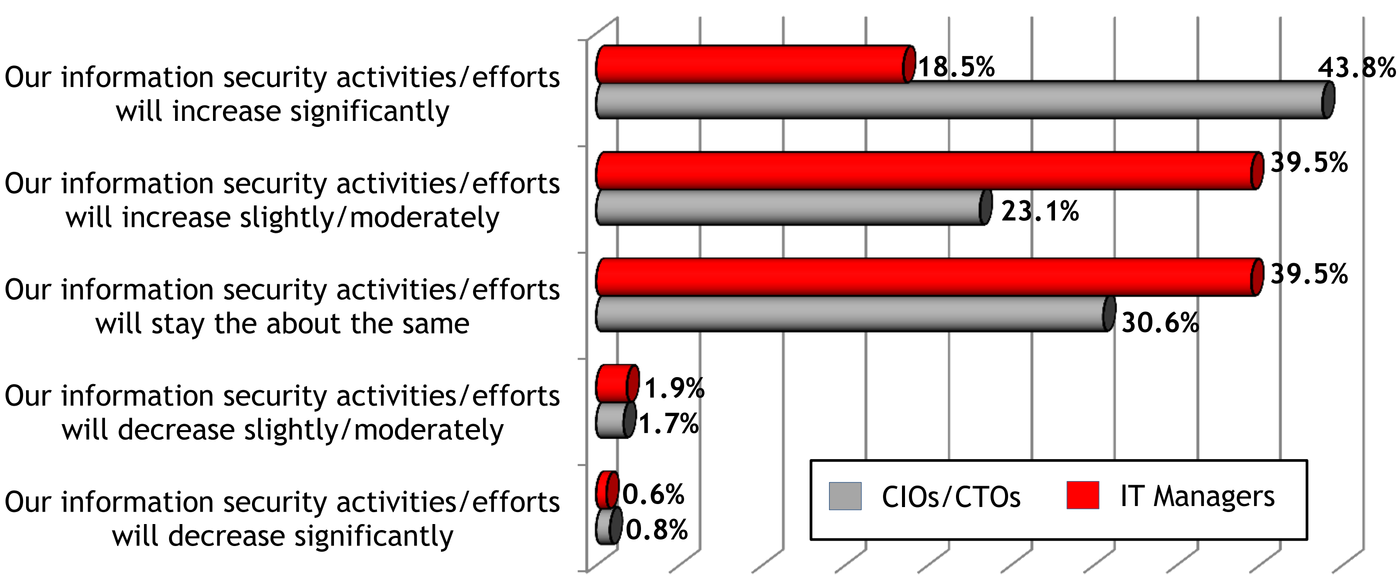
Information Security Impact to Priorities

How does "information security" affect your priorities/objectives?



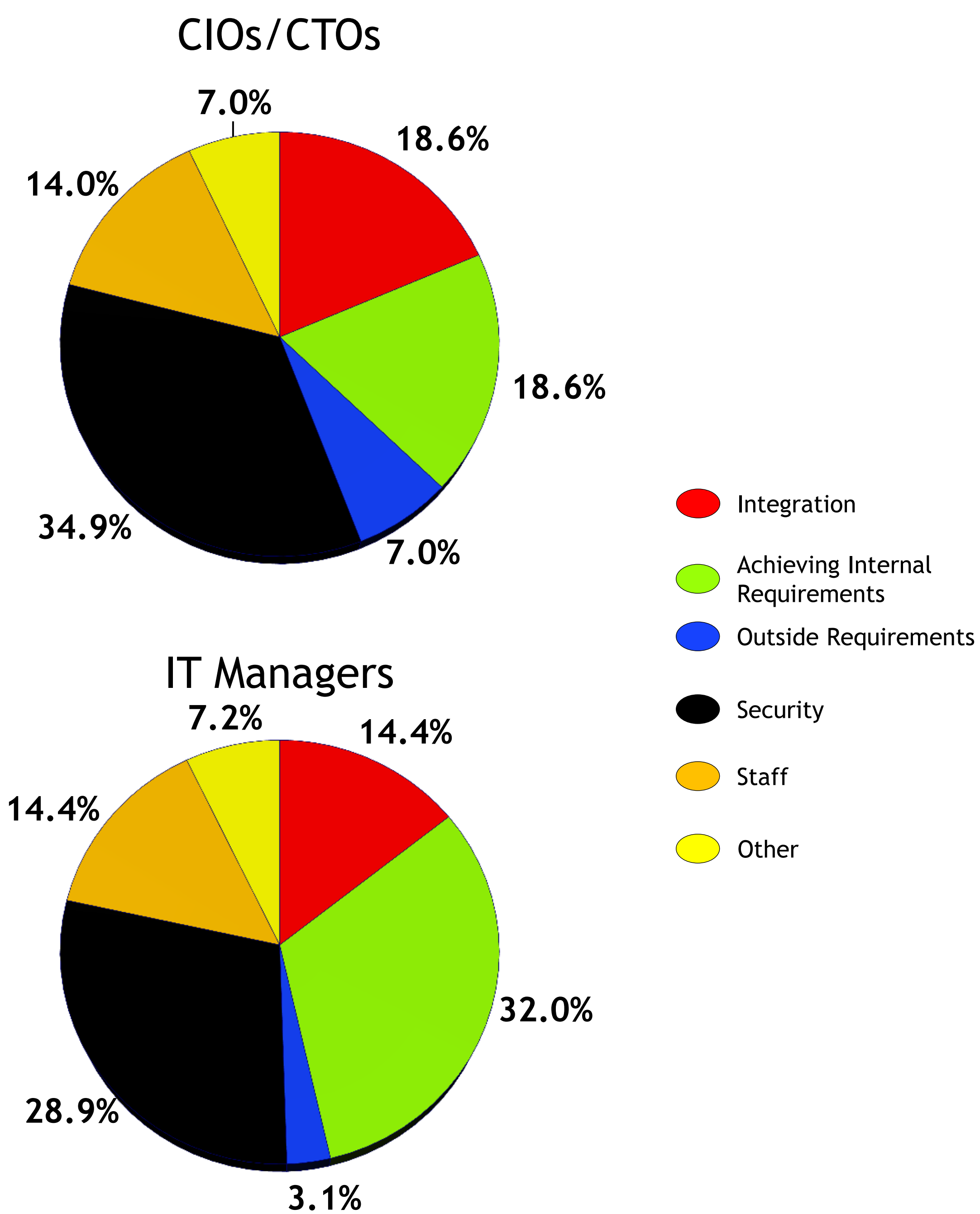
Information Security Activity Outlook - Next 12 Months

Looking forward to the next 12 months, how will your "information security" activities compare with the past 12 months?



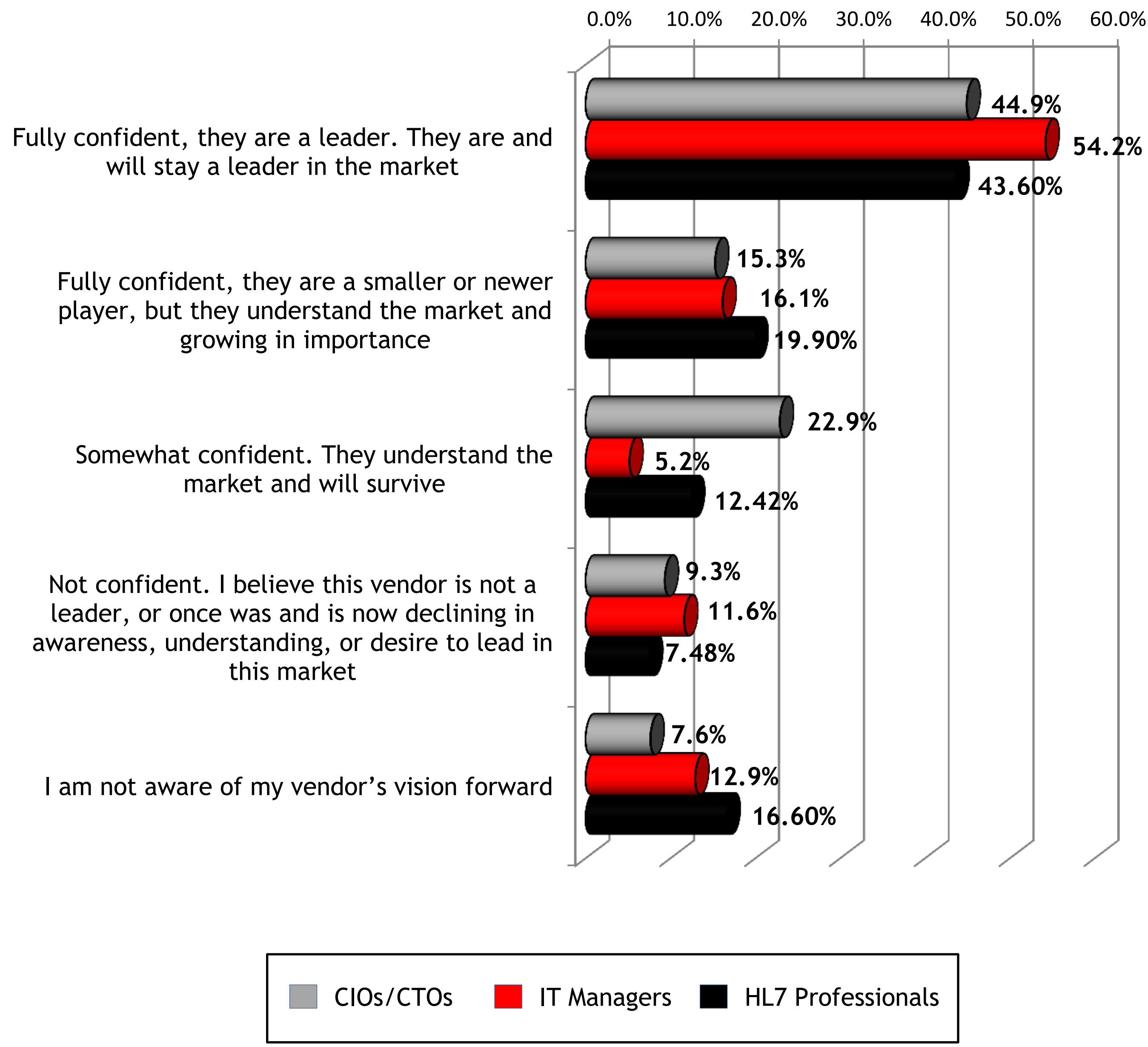
What Keeps You Awake at Night?

In regard to your work responsibilities, goals, and priorities: What keeps you up at night?



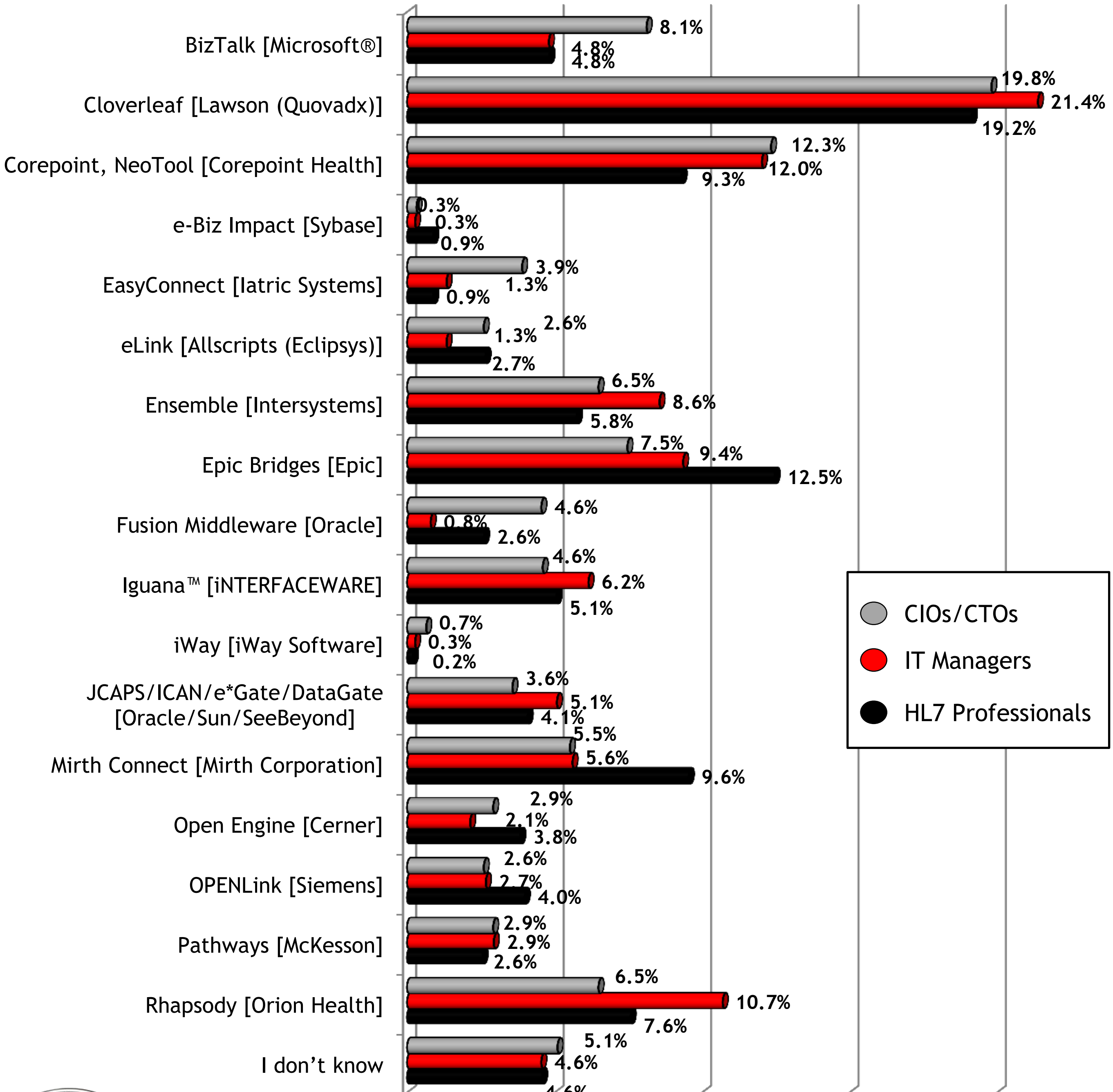
Vendor Confidence

How confident are you in the HL7 interface vendor that your organization uses?



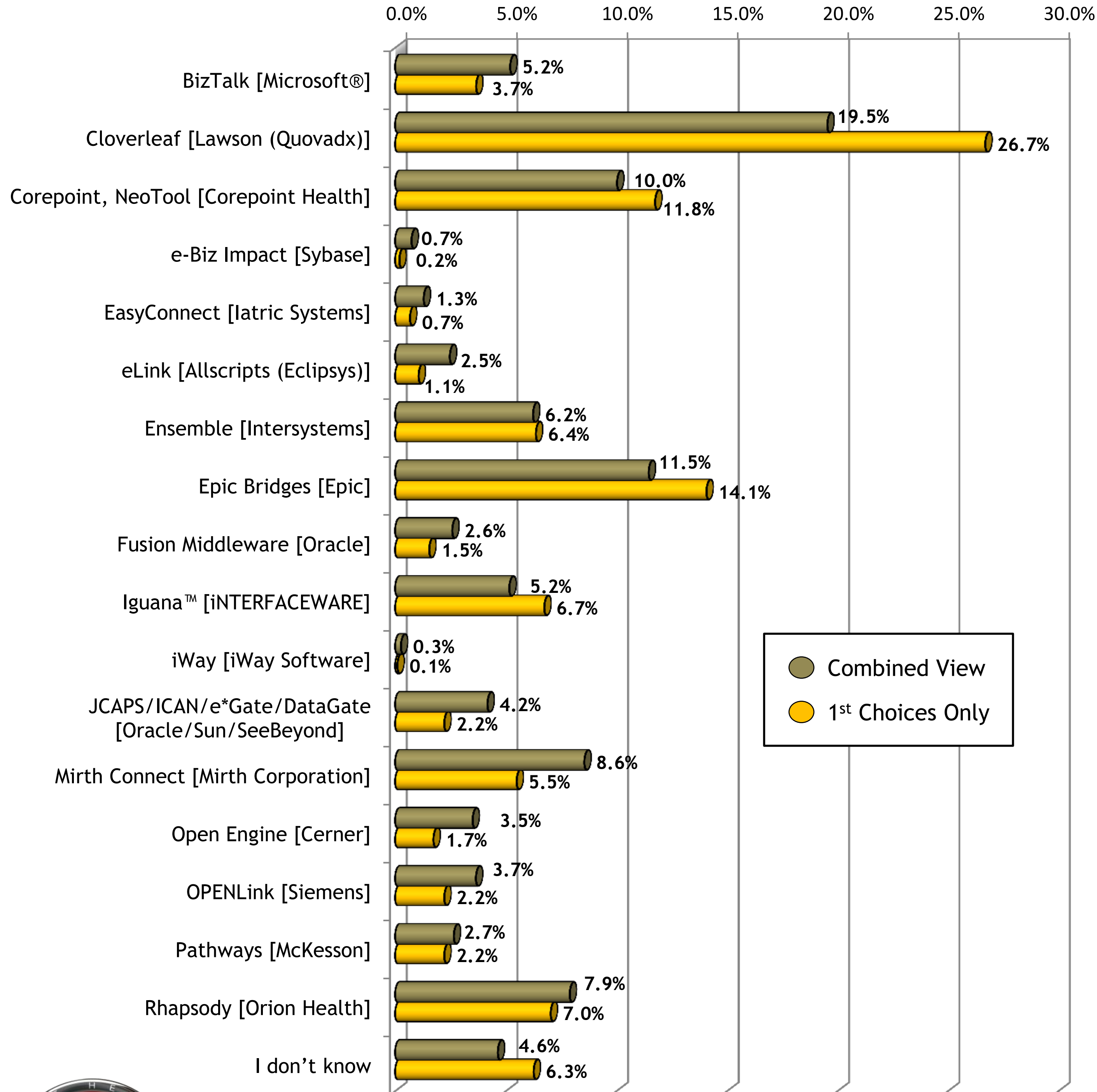
Future Market Leaders

What Interface Engine/Tool do you believe will be the market leader over the next 2-5 years?
CIOs/CTOs – IT Managers – HL7 Professionals



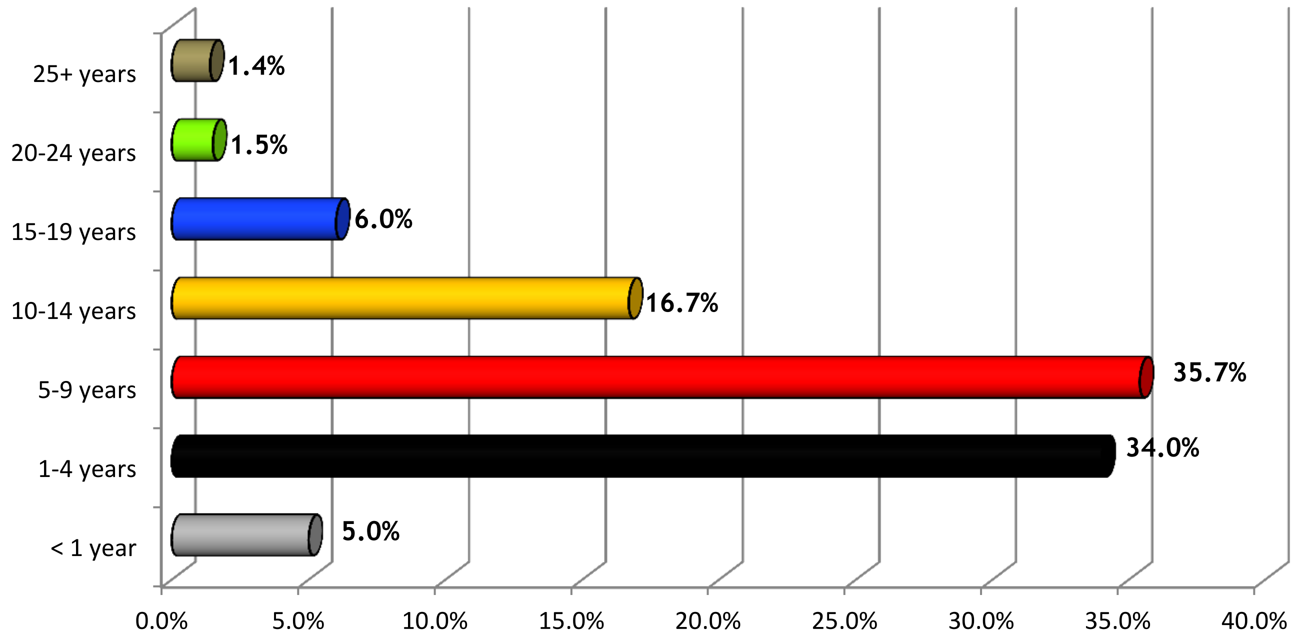
Future Market Leaders

What Interface Engine/Tool do you believe will be the market leader over the next 2-5 years?
Combined Total and 1st Choice Answers



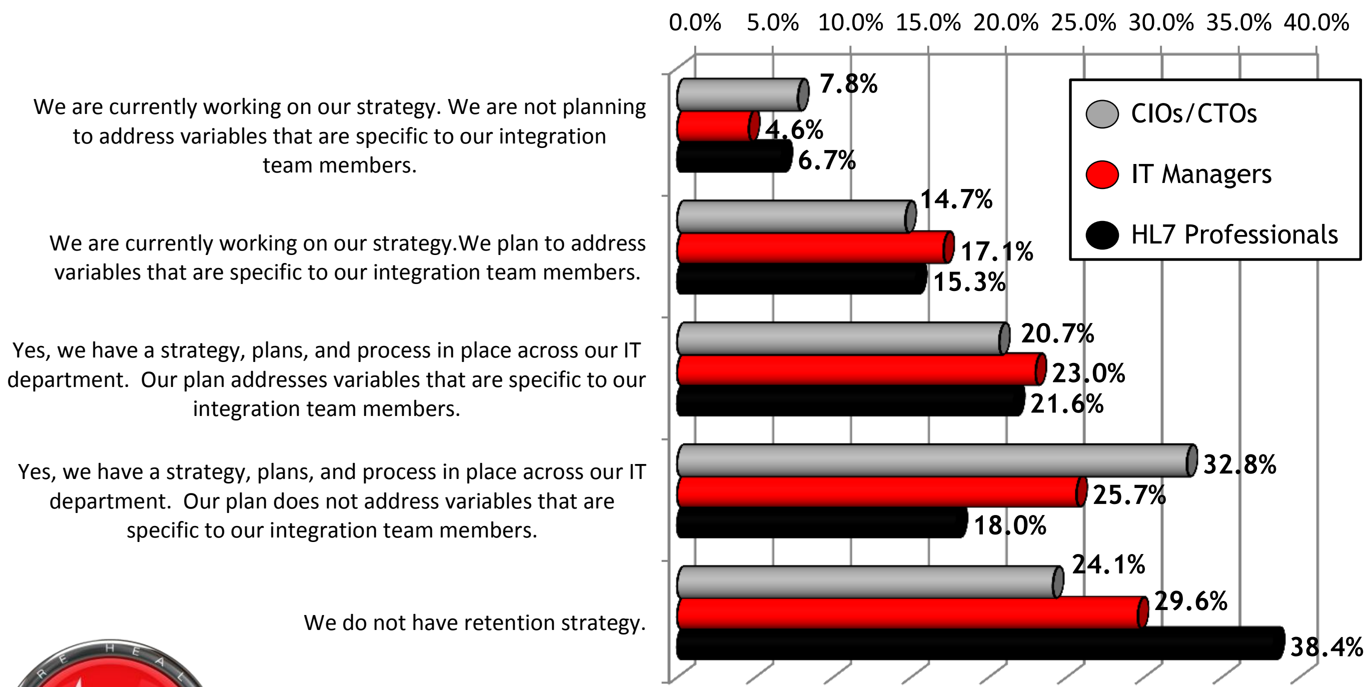
Integration Team Tenure

Combined View - What is the average tenure of your integration staff?



Staff Retention

Do you currently have a staff retention strategy?



HEALTHCARE INTEGRATION and HEALTH INFORMATION SECURITY

That's what we do!
Connecting and Protecting Health Information…

While we're known for growing up in healthcare integration, the fact is that our roots are grounded in a sound business model and solid core values. Core Health Technologies' unique business model of having a tight focus on a very specific skill discipline, growing an expertise within that discipline, and then investing into that specific community has helped us build a platform that produces results quickly and cost effectively. Our business model has also resonated with healthcare organizations across the country as they experience our values – **results, excellence, leadership** – in the execution of our day-to-day performance of business.

Healthcare Integration is where we built our reputation around a tightly focused team. While that team and our ability to provide solutions continues to grow in healthcare integration, our clients have asked us to duplicate our ability to produce results quickly in other areas they find challenging. One of the areas clients have asked for help is health information security. Today's dynamic market conditions within healthcare continue to introduce new challenges to the security of health information.

As a result of these challenges, and clients asking for a trusted solution provider, Core Health Technologies has expanded into health information security with the same sound business model and strong core values. Today, we can produce **results** with **excellence**, and provide the **leadership** our clients need in healthcare integration and health information security.