2013

HL7 Interface Technology Survey Results

The 2013 HL7 Interface Technology Survey Results provide a current view of the HL7 interface market within healthcare. The topics in this survey include technology, organizational priorities, meaningful use preparedness, and perspectives on interface engine vendors. Survey results are presented from the key perspectives, CIO/CTOs/CMIOs, IT Managers, and Integration Professionals.

These survey results provide a summary of the data collected during a three week period in Q4 2013 open to all participants through our website, www.corehealthtechnologies.com. We encouraged participation with email invitations and through various social media outlets.

Over 870 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.

Core Health Technologies - www.corehealthtechnologies.com 919-780-4HL7

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Observations by Core Health Technologies

- ***Participants have strong IT experience***. All three categories of participants in this years survey show that they are strong in IT experience with the greater majority of CIO/CMIOs (80.7%), Managers (72.5%), and Integration Professionals (54.8%) having 15+ years of IT experience.

- ***Organizations are bringing IT experience in from outside healthcare in significant numbers***. An interesting trend we observe this year is in the balance of participants' healthcare experience. In the two years since our 2011 survey, we see participants with 5 years or less of healthcare experience increase significantly. Managers with 5 years or less of healthcare experience grew from 8.5% in 2011 to 30.1% in 2013 and Integration Professionals grew from 20.9% to 65.1%. While not as significant, but just as impactful, is that CIOs with 5 years or less of healthcare experienced grew from 9.3% in 2011 to 11.3% this past year.

- ***Interface engine usage is diverse, with Cloverleaf still dominant among participants***. Infor's Cloverleaf engine (former Quovadx, Healthvision, Lawson) stays the leader in market share with 34.2%. The observed jump in Epic Bridges' market share, while not a major interface engine, is logical as a result of Epic's success over recent years. Mirth has also seen growth, rating 22.5% usage by participants.

- ***Strong Progress with Meaningful Use***. 67.5% of participating CIO/CMIOs stating they have achieved MU1, up from 42.6% last year. In addition, roughly 82% are on track to achieve MU1 by the end of 2014. One concerning statistic is that 22.9% of all Integration Professionals who participated state they do not know what Meaningful Use is.

- ***Health Information Exchange (HIE) effort is active***. 65.4% of CIOs/CMIOs state they are actively working with some form of HIE, whether external HIE organization or an internal HIE. In addition, 21.3% are currently researching and making plans with HIE, and only 5.3% state that HIE is not a priority, or they are unaware of their status.

- ***Many challenges to HIE progress***. Participants to this years survey shared many challenges in regard to their organization making HIE progress. Competing Organizational Priorities was listed as the top overall challenge (CIO/CMIO: 27.6%, Managers: 31.6%, Professionals: 28.7%) while Connectivity rated as the top technical challenge (CIO/CMIO: 21.6%%, Managers: 25.1%, Professionals: 29.2%).

- ***Many IT priorities this year with Meaningful Use topping the list as #1***. While 20 different categories had enough response to list as priorities this year, the most listed priority was Meaningful Use (CIO/CMIO: 21.6%, Managers: 24.2%, Professionals: 21.6%)

Observations by Core Health Technologies

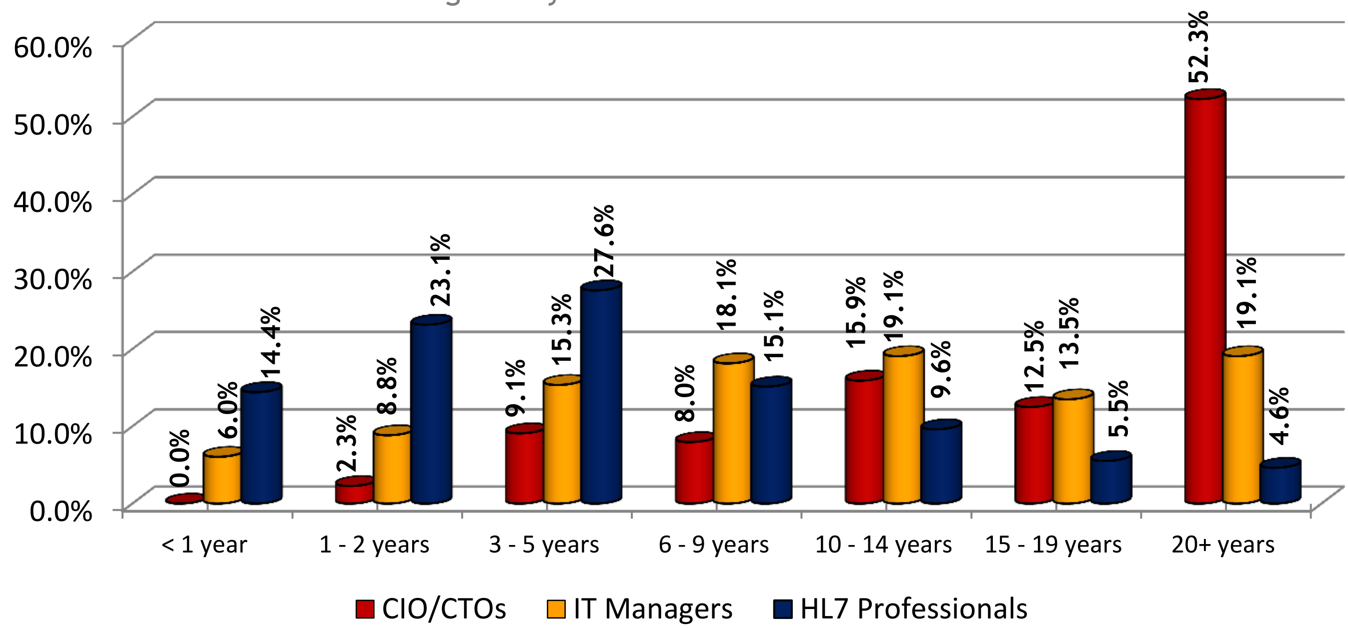
- ***Integration activity will increase over the next 12 months.*** All three categories of participants in this years survey indicate that they expect integration activity to increase (CIO/CMIO: 79.7%, Managers: 74.6%, Professionals: 63.3%).

- ***Significant growth in confidence for Corepoint, Iguana, and Rhapsody as Future Market Leaders.*** Corepoint (Corepoint Health) and Iguana (iNTERFACEWARE) each registered 17.1% of CIO/CMIO participants as their #1 choice for future market leader in the next 2-5 years. This is an increase in one year from 12.3% for Corepoint and 4.3% for Iguana. We also saw the corresponding decrease in CIO/CMIO confidence with Cloverleaf, decreasing from 19.8% (#1 choice) and 19.5% (1^{st}-3^{rd} choice) in 2012 to 15.7% (#1 choice) and 12.2%(1^{st}-3^{rd} choice) this year. Corepoint and Rhapsody (Orion Health) both had strong performance with the Manager participants, who selected them 17.1% and 15.2% respectively.

- ***Inconsistent awareness of staff retention strategies & plans.*** We observe this year that 80.9% of CIO/CMIO participants state that they either have active strategies & plans (61.8%) or actively working on them (19.1%). This is in strong contrast to the 57.8% of Integration Professionals that state they do not have a policy, or don’t know if they have one.

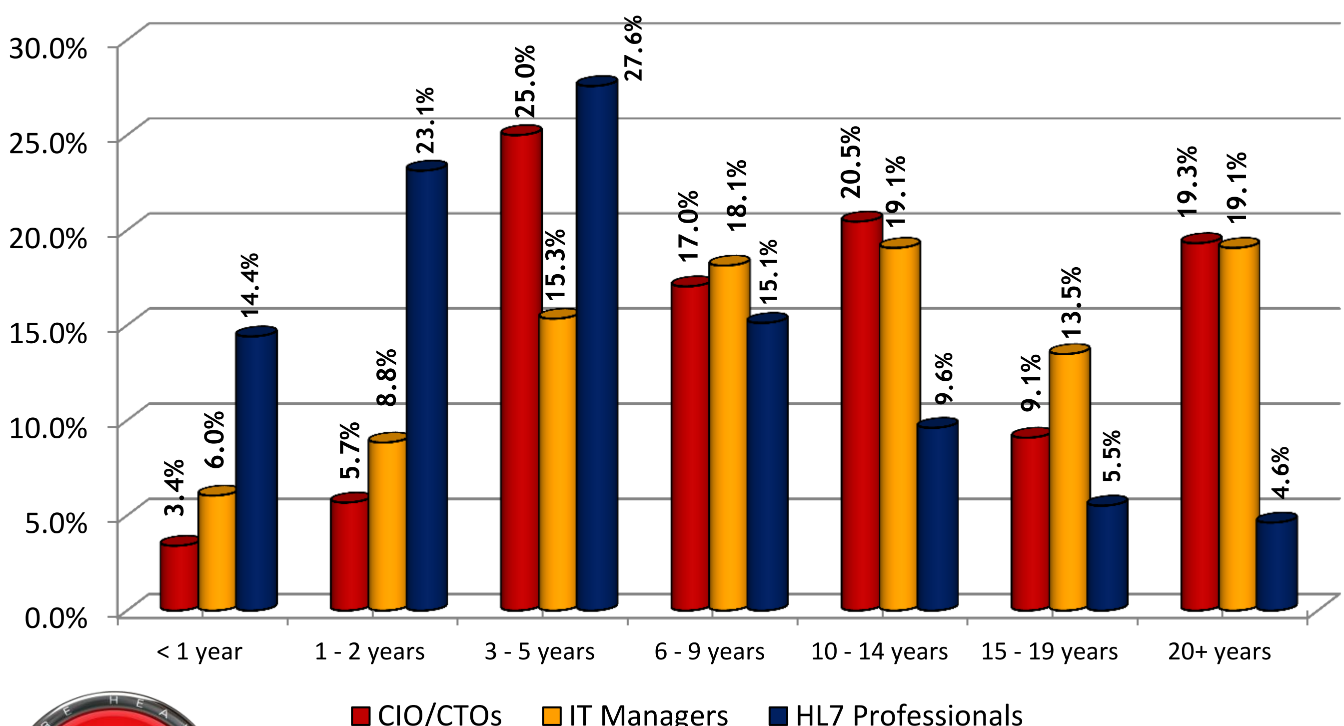
Tenure in Healthcare

How long have you been in the healthcare sector?



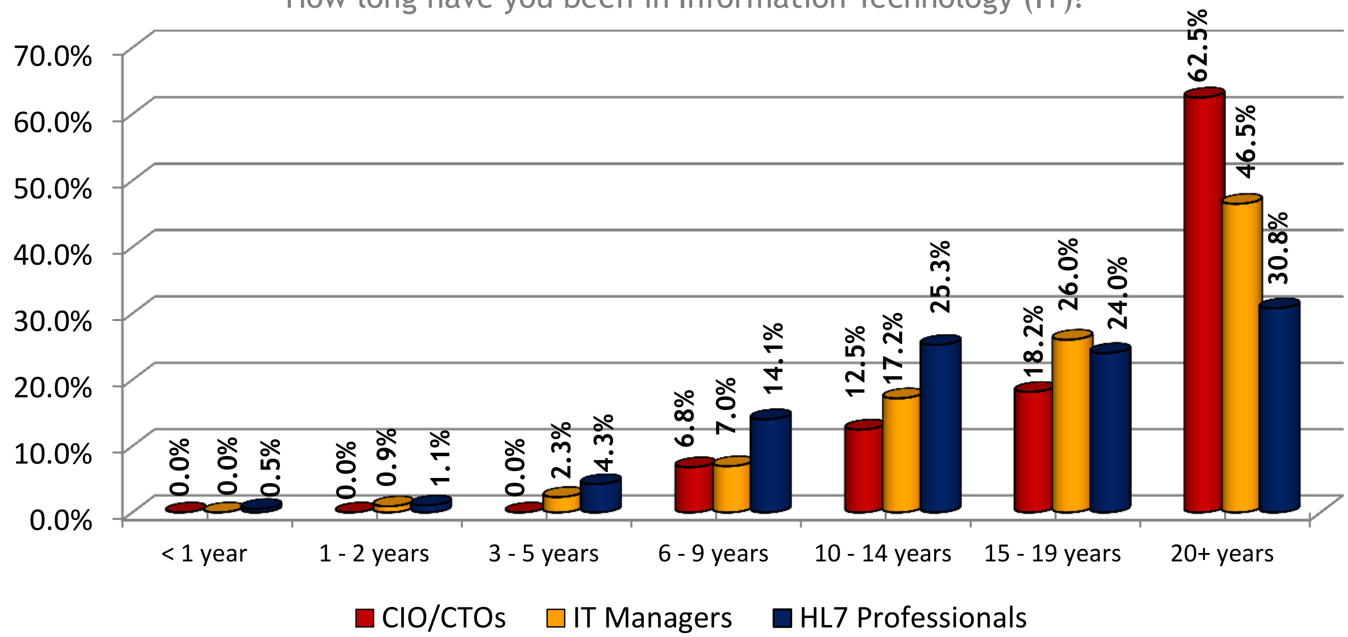
Tenure in Organization

What is your tenure within your current organization?



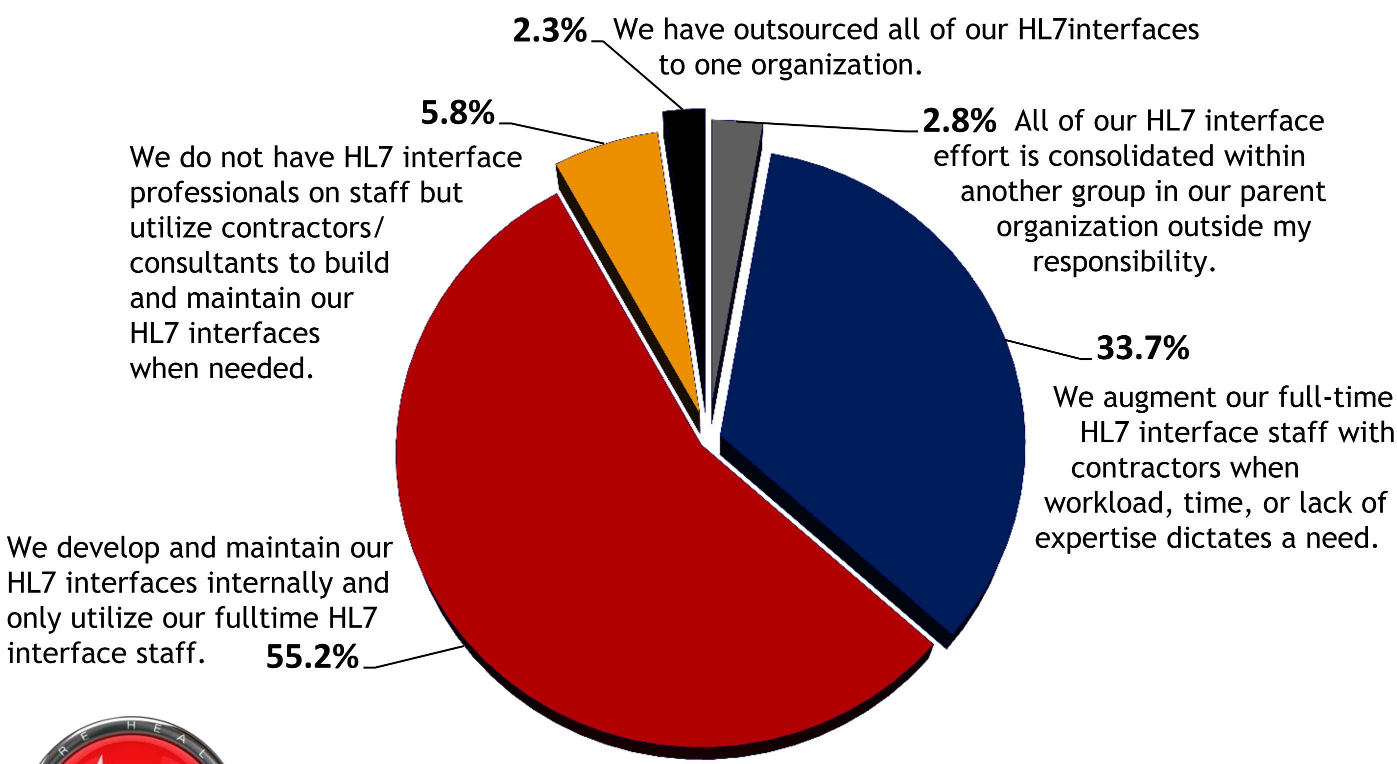
Tenure in IT

How long have you been in Information Technology (IT)?



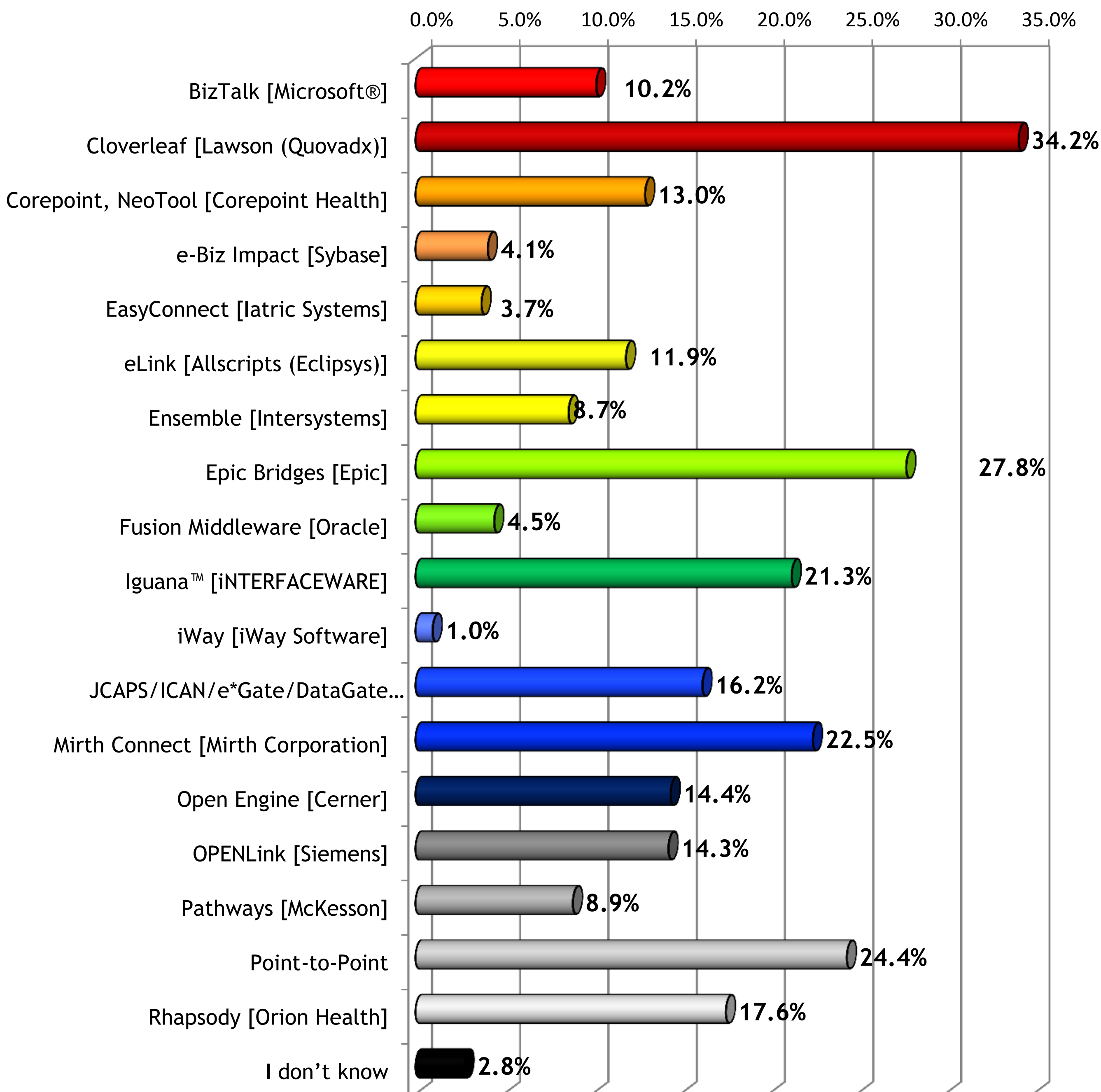
Employment Preference

Which best describes your organization's HL7 employment preference?



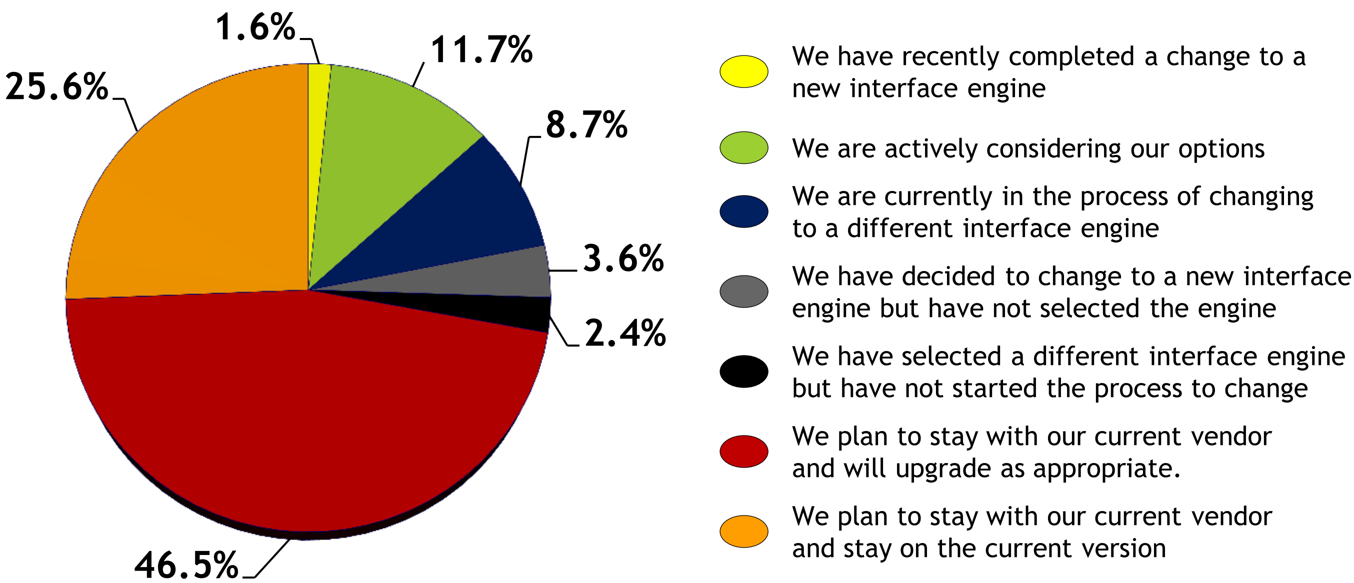
HL7 Technologies

Select all specific HL7 interface technologies which your organization currently utilizes



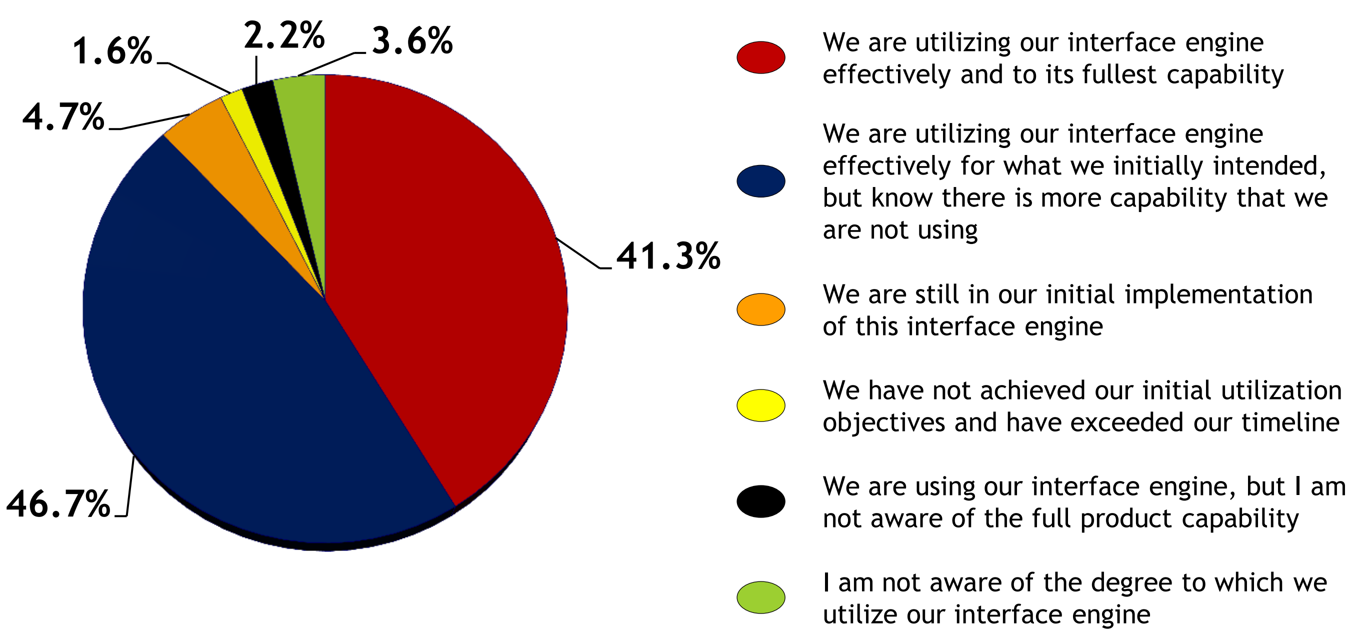
Current Interface Engine Status

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



Interface Engine Utilization

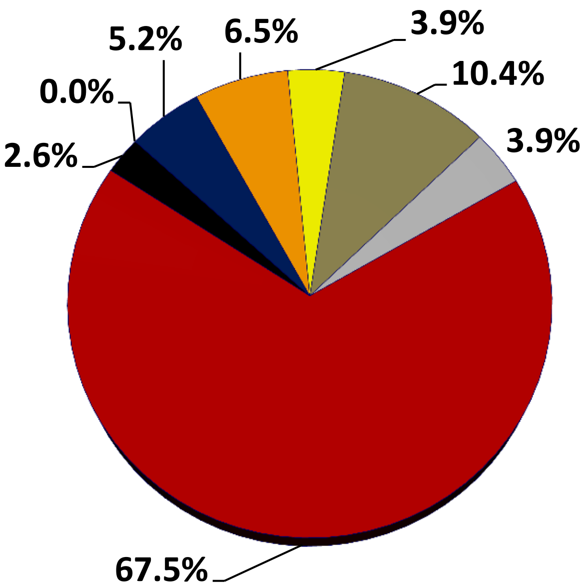
To what degree is your organization utilizing your interface engine(s)?



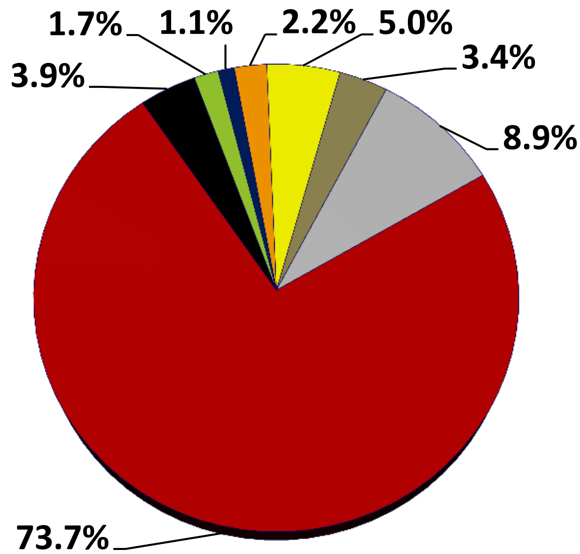
Meaningful Use Preparedness

How well is your organization prepared to achieve Meaningful Use Stage 1 & Stage 2 criteria?

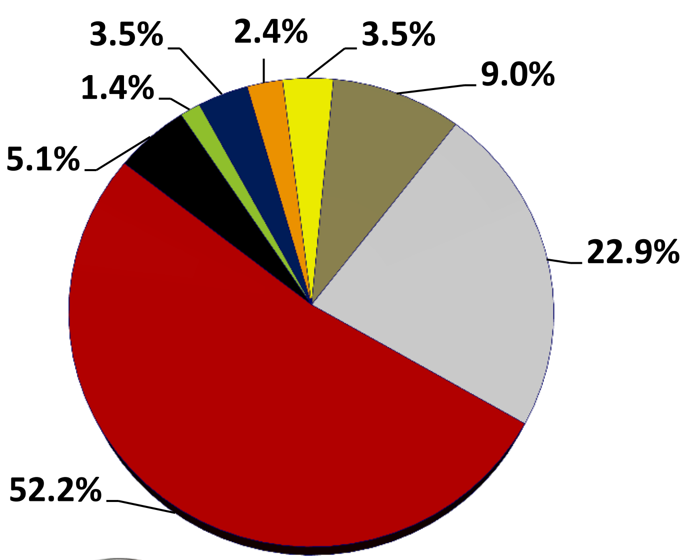
CIOs/CTOs



IT Managers



HL7 Professionals

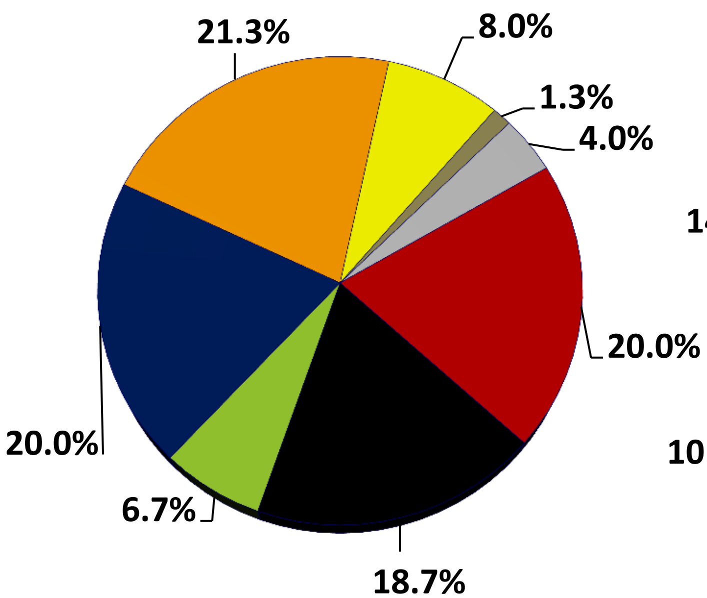


- We have achieved Stage 1 and are actively working to achieve Stage 2
- We have achieved Stage 1 but not working on Stage 2 criteria yet
- We are currently in the ONC certification process for Stage 1
- We are currently on track for Stage 1 certification in 2013
- We are currently on track for Stage 1 certification in 2014
- We do not have a current milestone set but it is a priority
- We do not have a current milestone set and it is not a current priority
- I do not know

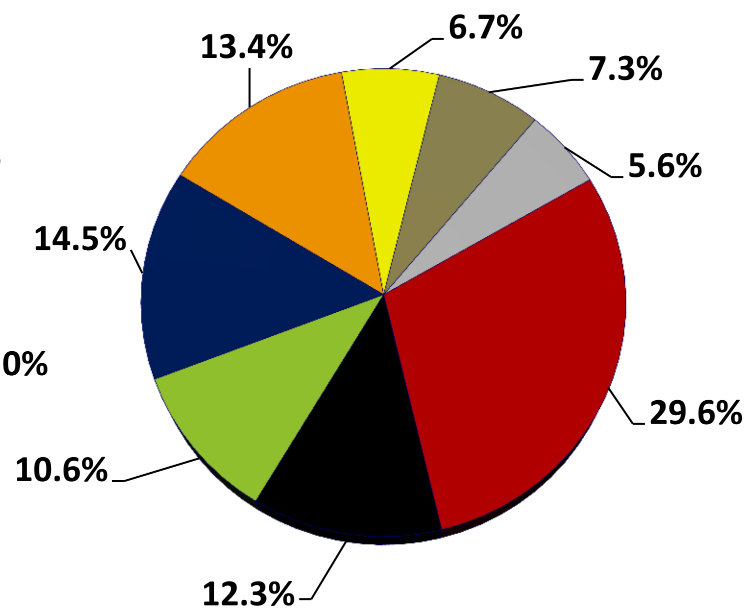
HIE Involvement & Status

Please select the statement that best describes your organization's current HIE status.

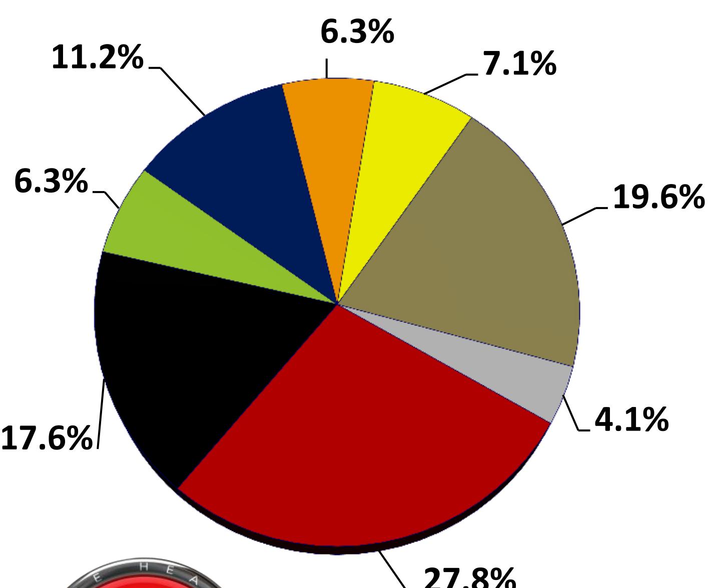
CIOs/CTOs



IT Managers



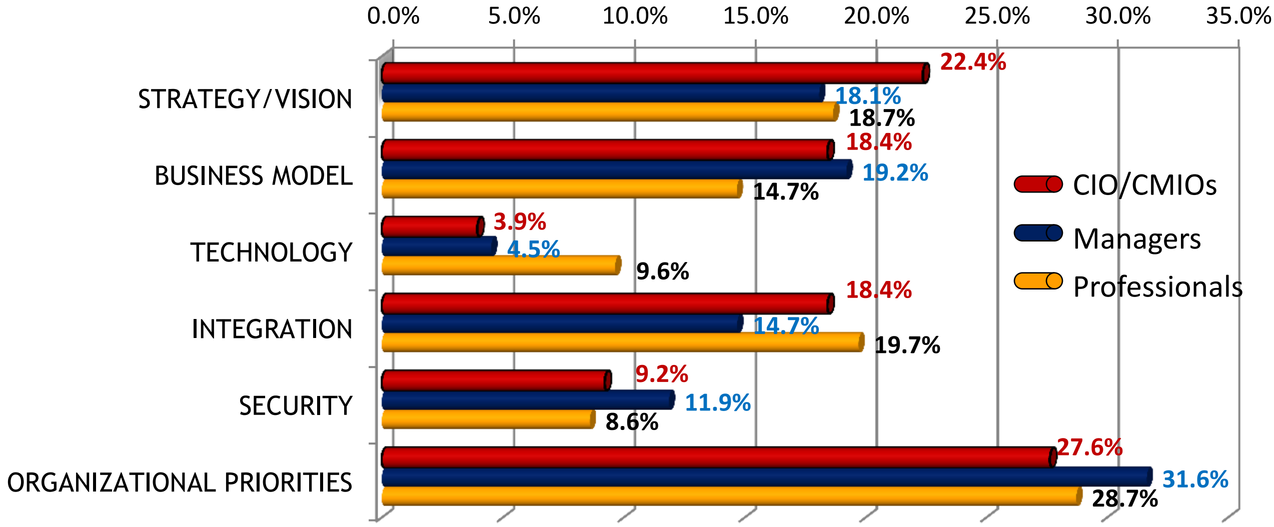
HL7 Professionals



- We are actively integrating with an HIE outside our organization.
- We are actively integrating with more than one HIE outside our organization
- We are actively integrating with our own organization's HIE, but no HIE outside
- We are currently working towards integrating with an HIE outside our org
- We are currently researching and making plans to start working towards integrating with an HIE outside our organization.
- We do not have a current milestone set but it is a priority
- We are currently not engaged in any activity or planning regarding integrating with an HIE.
- I do not know

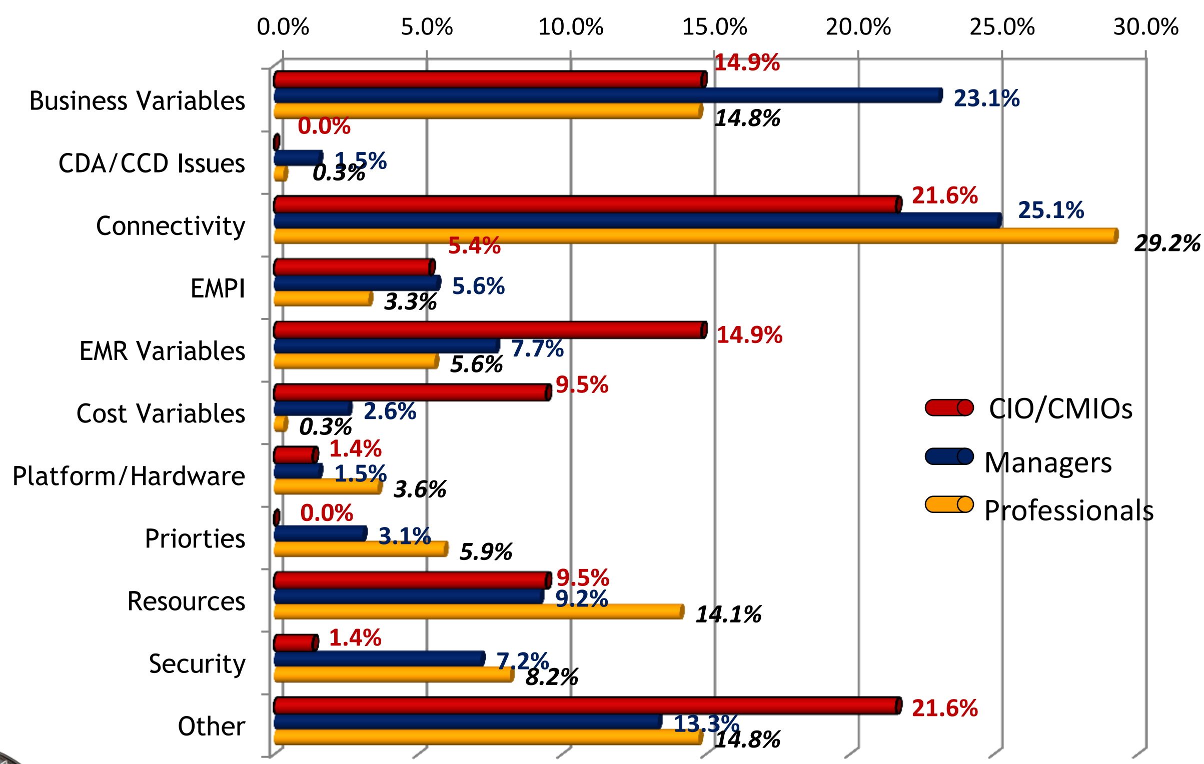
Biggest HIE Challenges

What are your organization's biggest current challenges regarding HIE?



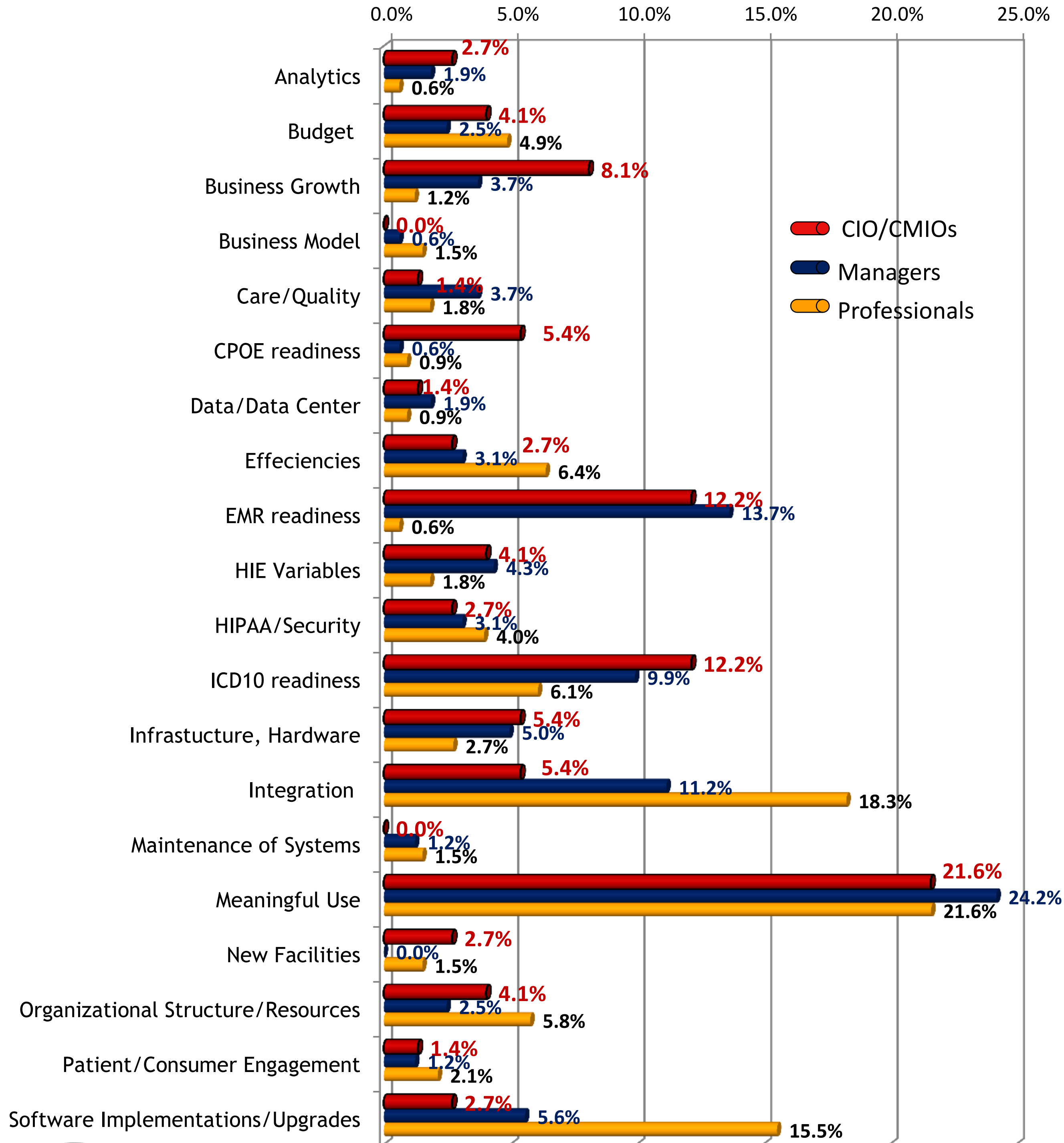
Technical HIE Challenges

What are your organization's top three technical challenges with regard to HIE?



Top IT Priorities

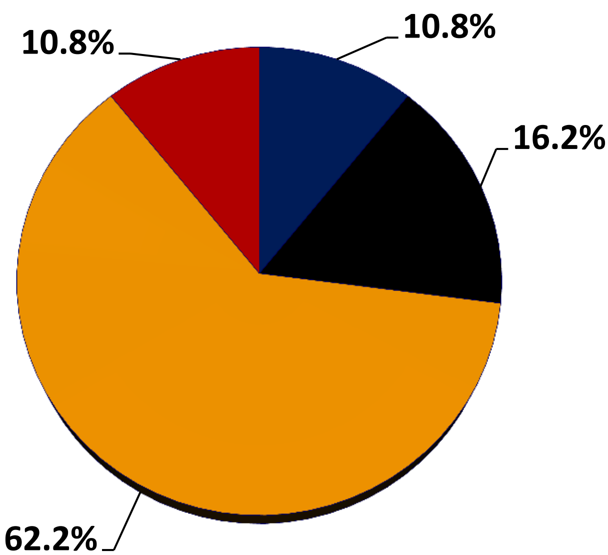
What are the top three priorities/objectives for your internal IT organization this year?



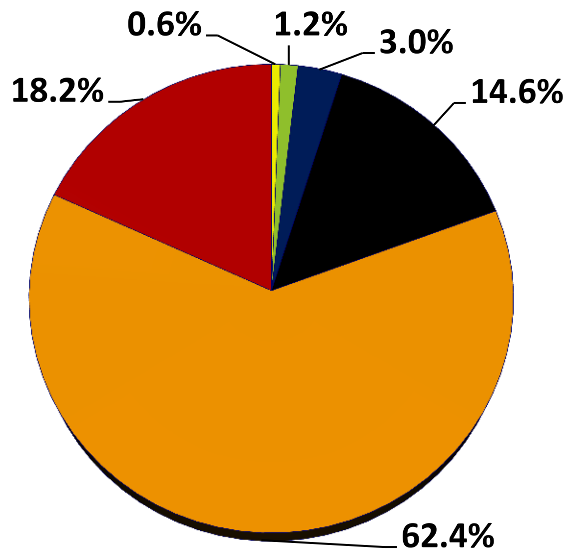
Healthcare Integration Impact to Priorities

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

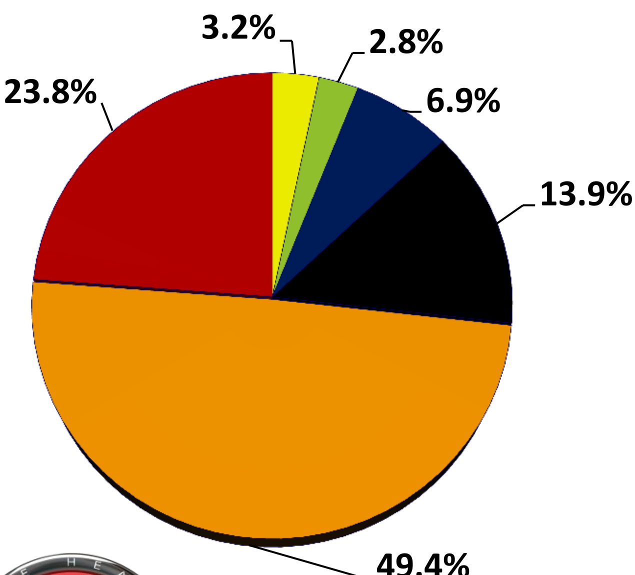
CIOs/CTOs



IT Managers



HL7 Professionals

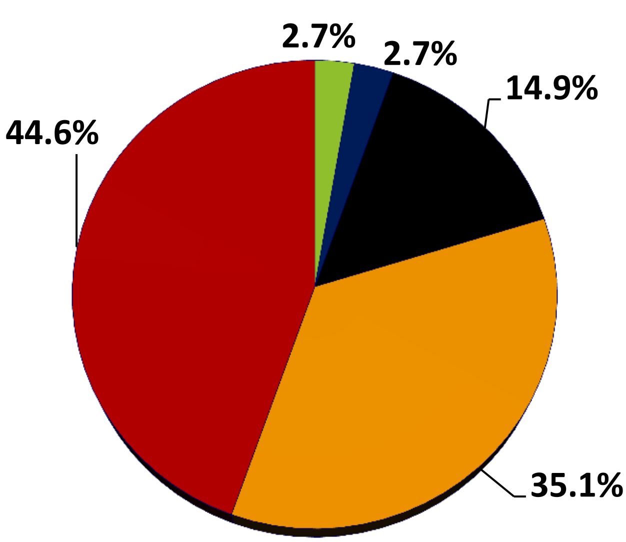


- Integration is our top priority
- Integration is integral to at least one of our priorities
- Integration is integral to all of our priorities and cannot be separated
- Integration has some effect on us achieving our top priorities
- Integration has little effect on us achieving our top priorities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

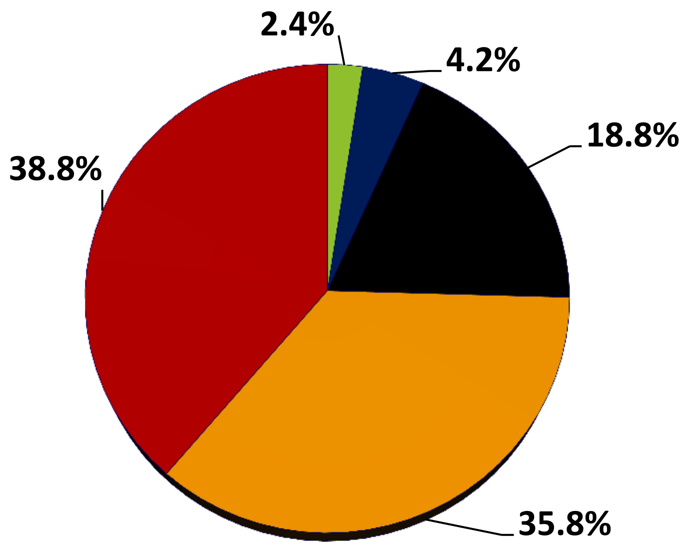
Integration Activity Outlook - Next 12 Months

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

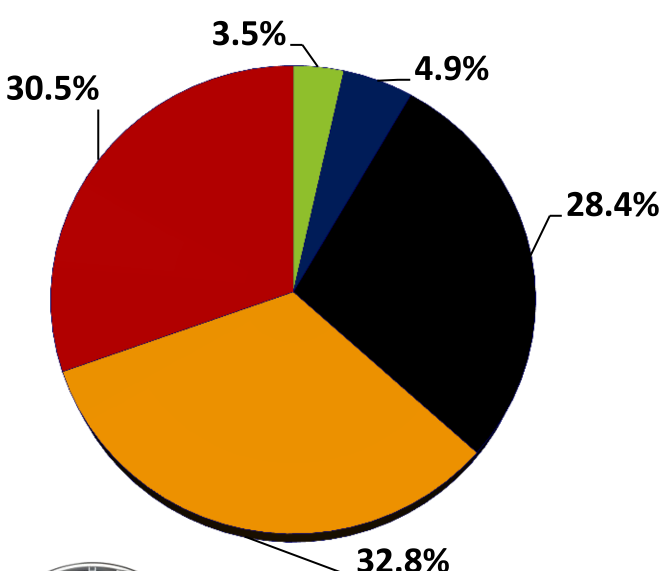
CIOs/CTOs



IT Managers



HL7 Professionals

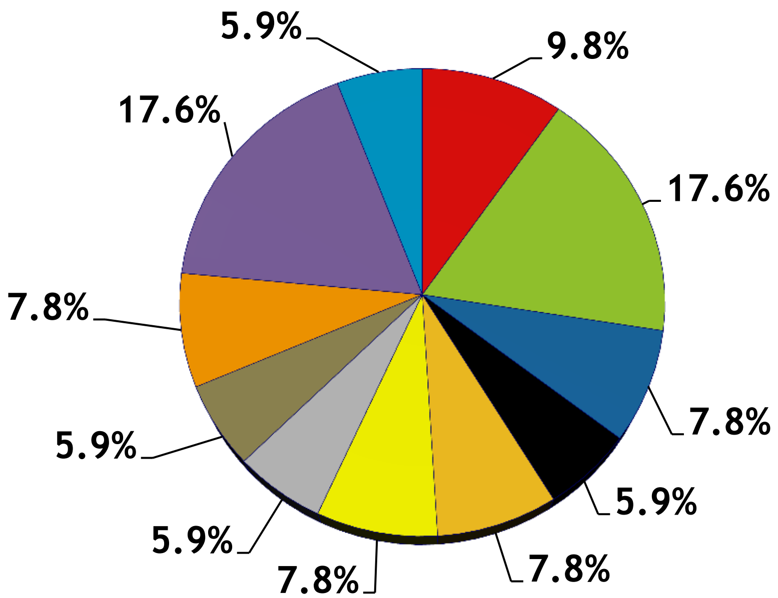


- Our integration activities/efforts will decrease significantly
- Our integration activities/efforts will decrease slightly/moderately
- Our integration activities/efforts will stay the about the same
- Our integration activities/efforts will increase slightly/moderately
- Our integration activities/efforts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

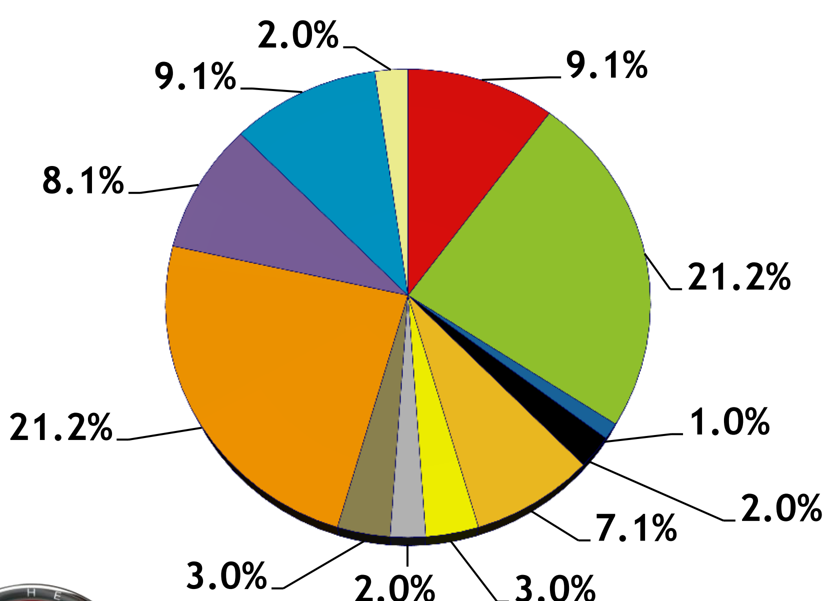
What Keeps You Awake at Night?

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

CIOs/CTOs



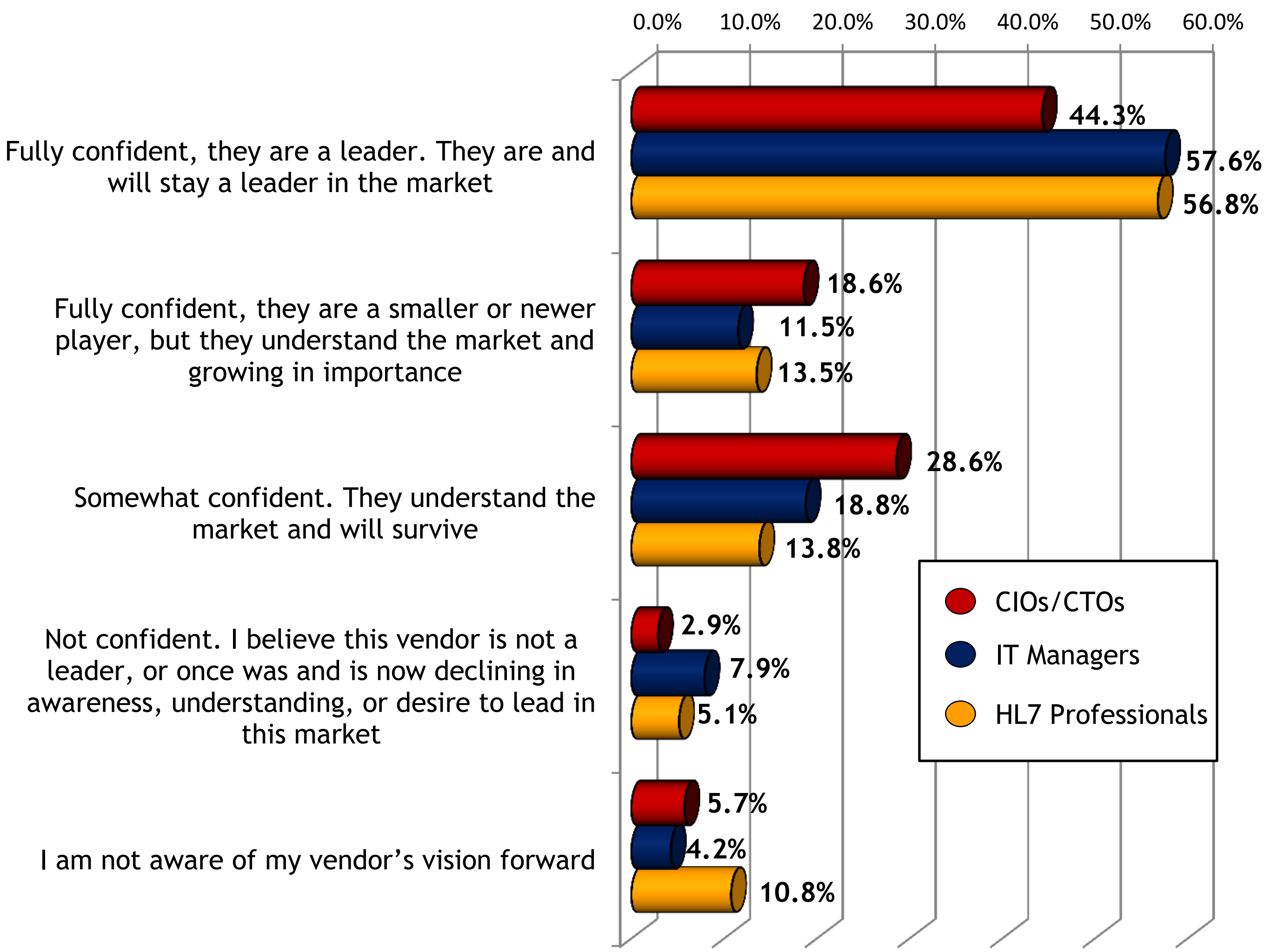
IT Managers



- Requirements & Strategic Vision
- Work Pace, Complexity, Priorities
- Funding/Budget
- ICD10
- Integration Variables
- Meaningful Use
- Vendor/Product Ability
- Patient-Focused Services
- Staff/Resources
- Privacy & Security
- Stability & Uptime
- Personal Career

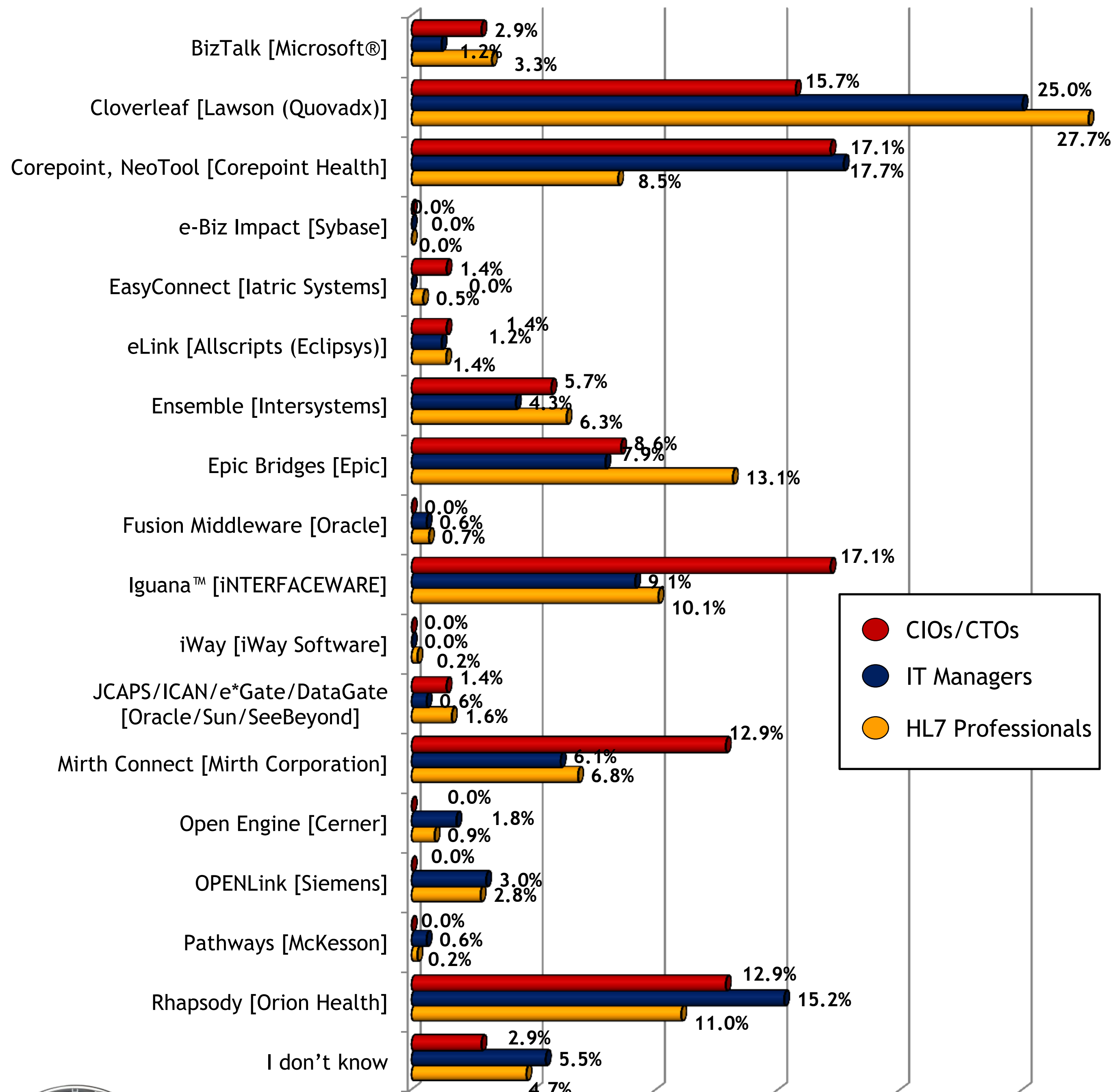
Vendor Confidence

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



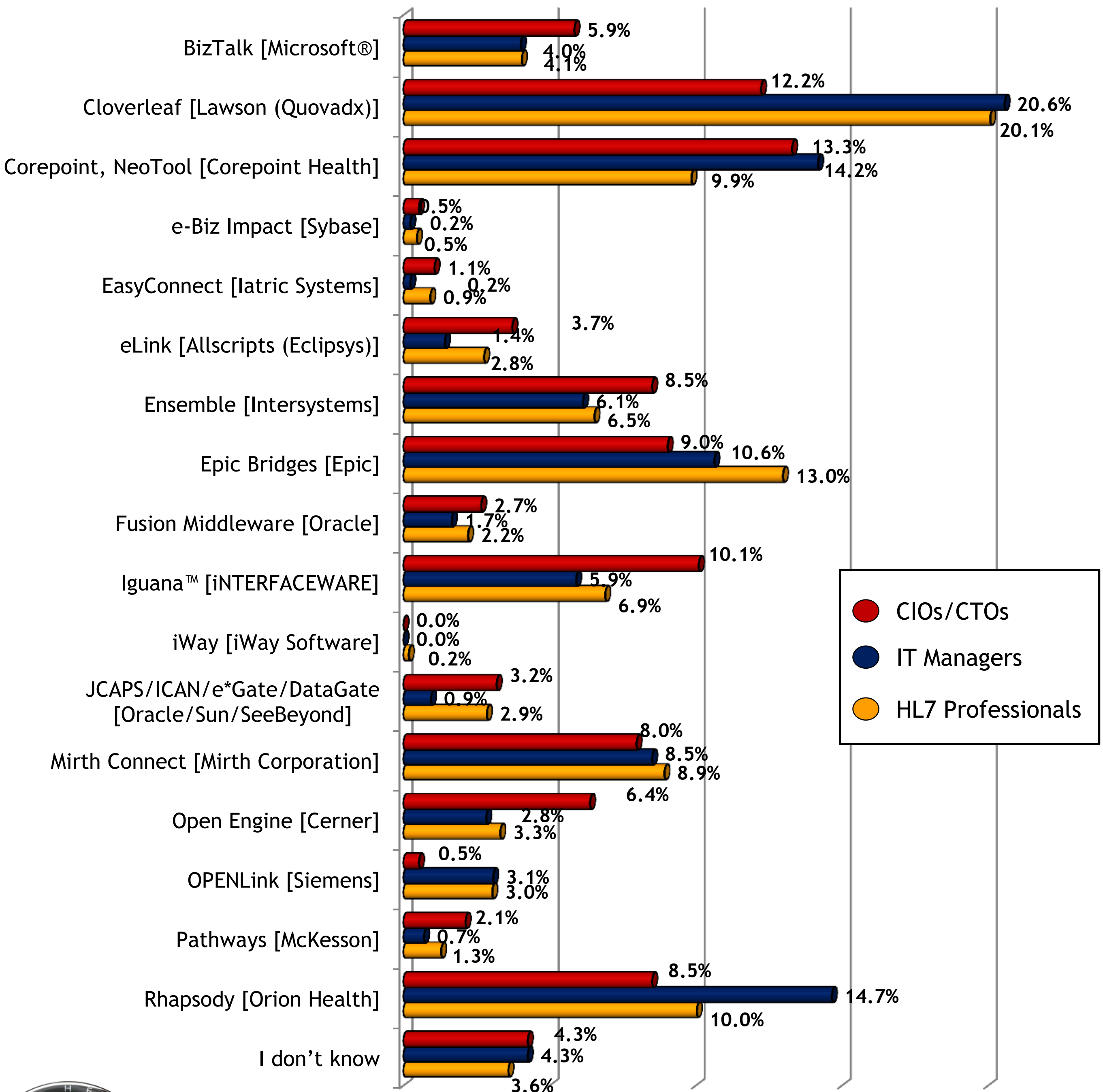
Future Market Leaders - #1 Answer

What Interface Engine/Tool do you believe will be the market leader over the next 2-5 years? Total of just top (1st choice) answers.



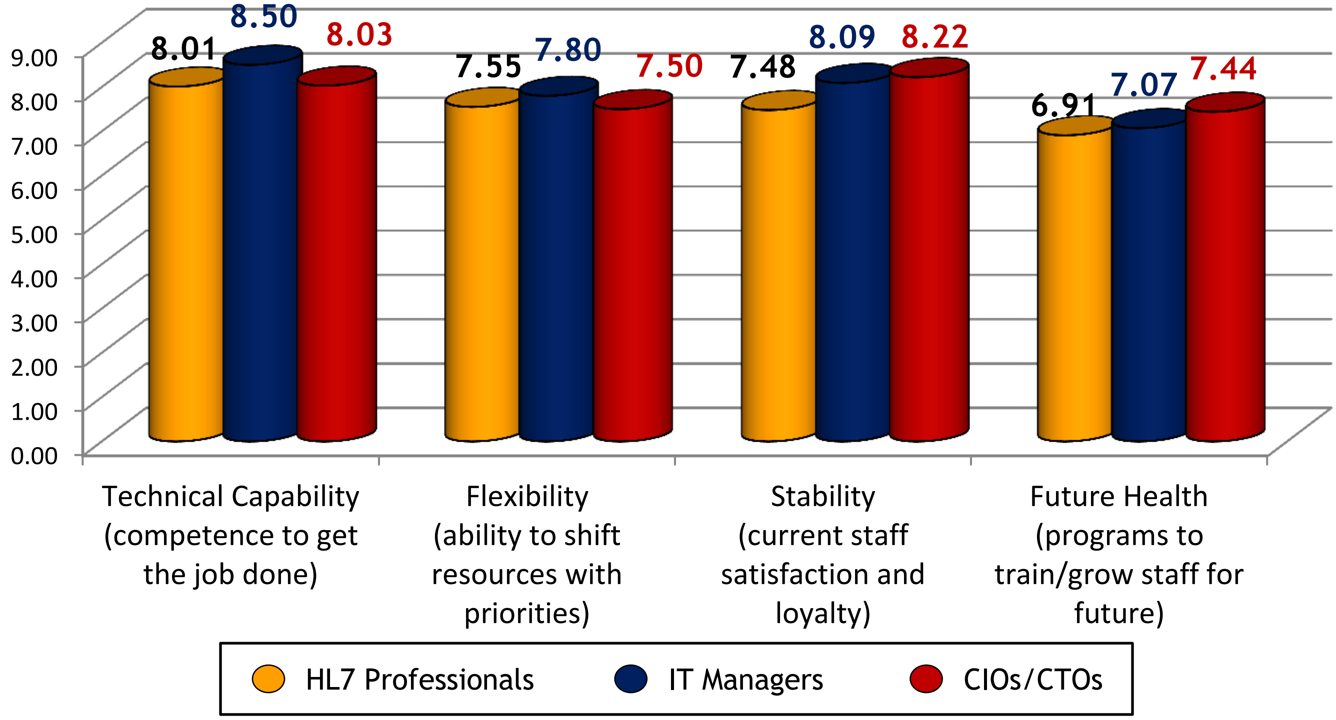
Future Market Leaders – All Answers

What Interface Engine/Tool do you believe will be the market leader over the next 2-5 years?
Combined Total of 1st, 2nd, and 3rd choice answers.



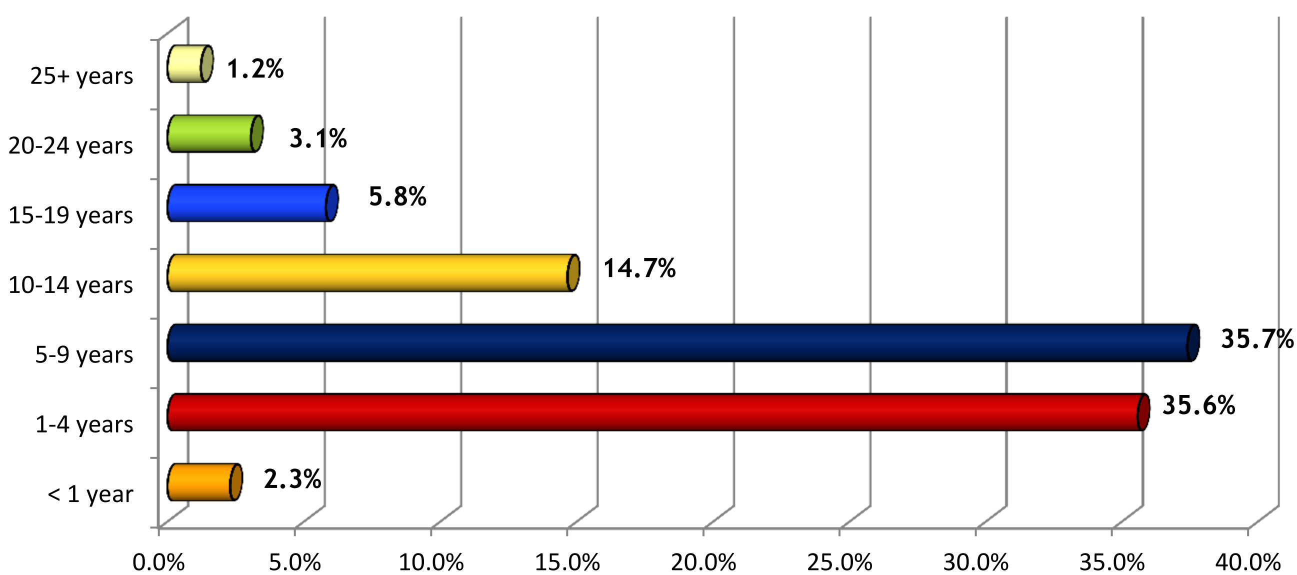
Integration Team Health

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



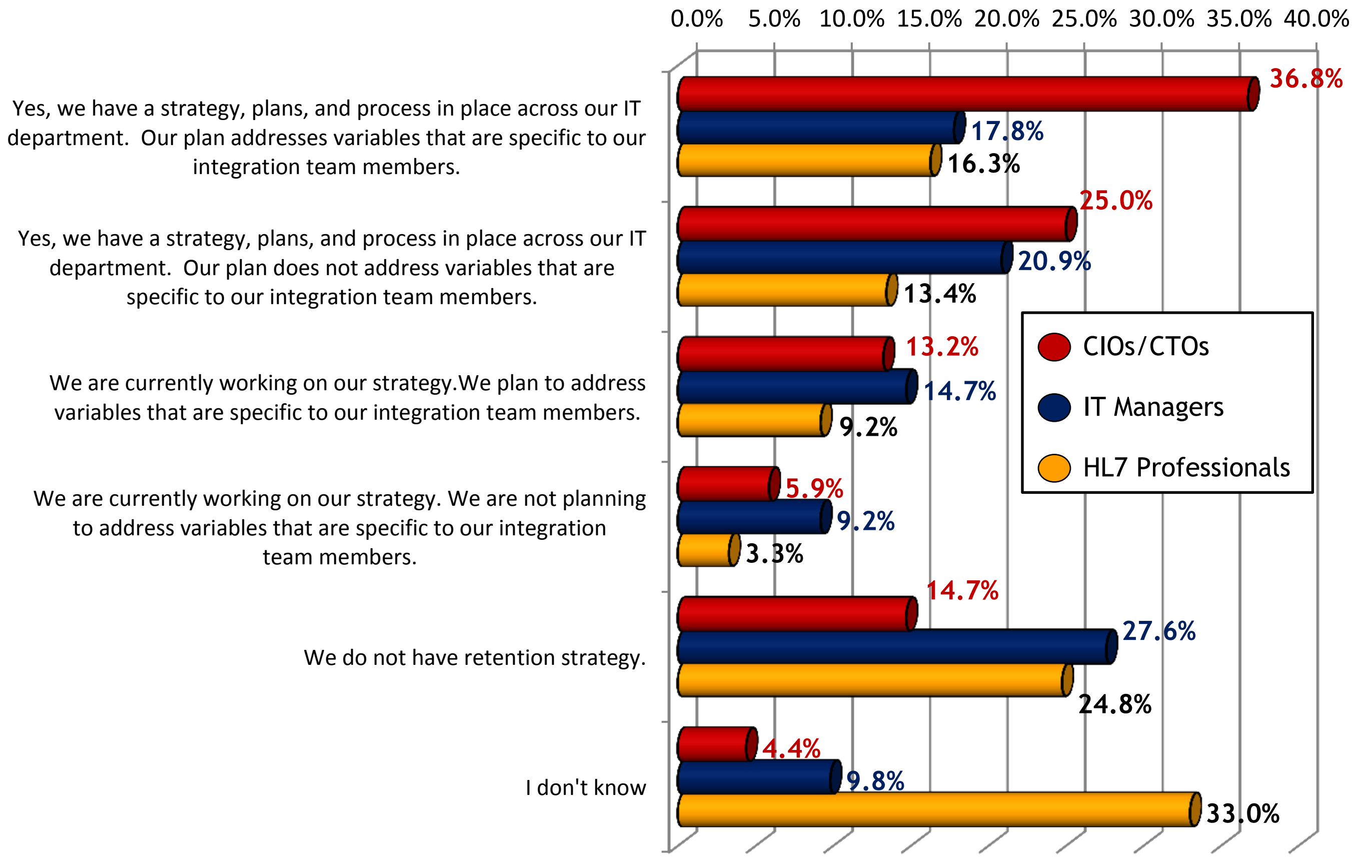
Integration Team Tenure

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



Staff Retention

Do you currently have a staff retention strategy?



HEALTHCARE INTEGRATION

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.

As a vendor-neutral solution provider, Core Health Technologies can answer the call and deliver the results you need. Whether it is building a team to conduct all the integrations for a specific project, providing specific expertise to lead an effort for a specific project or length of time, or providing ongoing integration services long-term to minimize cost and increase control, you can count on our results, leadership, and expertise.