

OLSON RESEARCH GROUP INDUSTRY INSIGHTS

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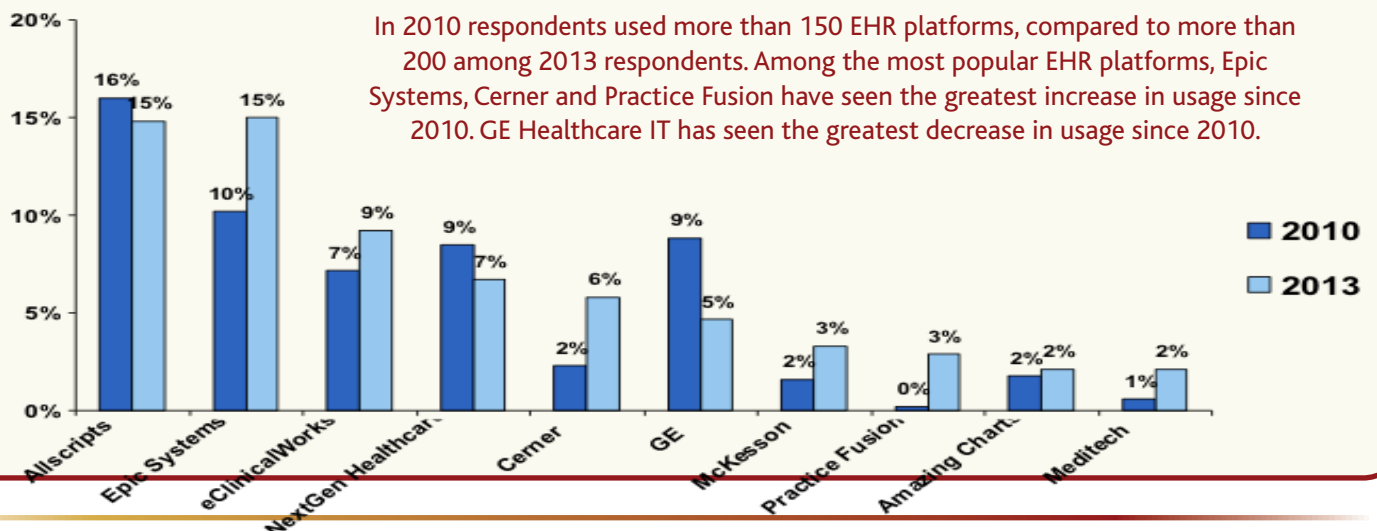
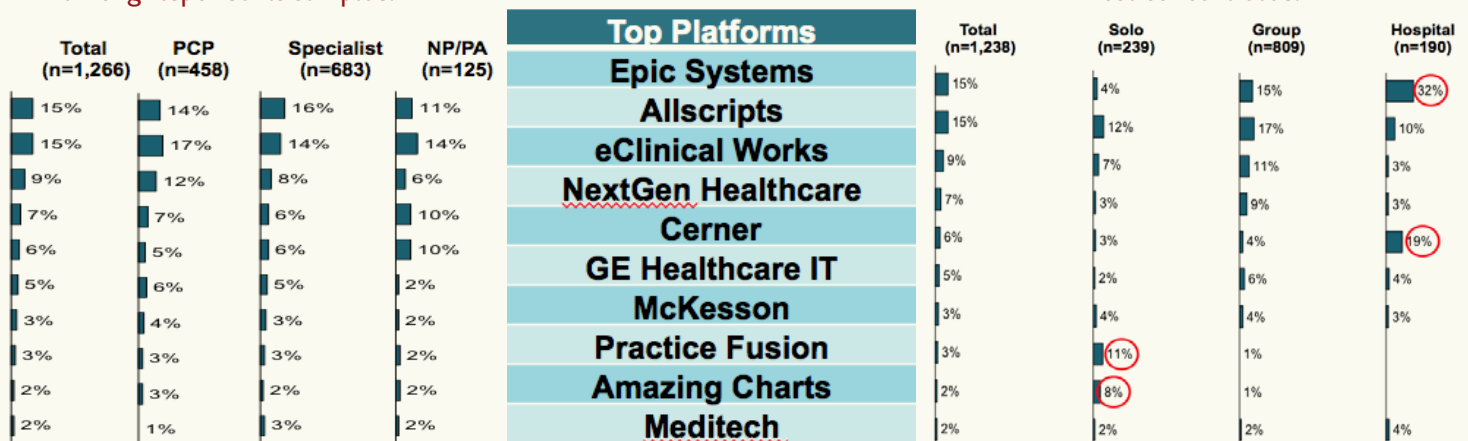
Electronic Health Record (EHR) Platforms: Industry Landscape

Using our internet-based tool OlsonOnline™, fueled by the engine of our proprietary healthcare database, Olson Research surveyed more than 1,600 US healthcare professionals, including a mix of PCPs, specialists, and NP/PAs from solo, group, and hospital-based practices in January 2013. The objective for the research pieces was to delve deeper into the EHR platforms that are most commonly used by healthcare professionals in this increasingly crowded industry. It is worth noting that 79% of respondents are currently using EHRs, 42% of EHR Non-users are most likely to be solo practitioners and 76% of respondents have been using EHRs for more than one year.

Which EHR Platforms are Participants Currently Using?

Epic Systems and Allscripts are the two most commonly used EHR platforms, accounting for 30% of total usage among respondents sampled.

Healthcare professionals from solo practices use the widest range of EHR platforms, while HCPs at hospitals are the most concentrated.



In 2010 respondents used more than 150 EHR platforms, compared to more than 200 among 2013 respondents. Among the most popular EHR platforms, Epic Systems, Cerner and Practice Fusion have seen the greatest increase in usage since 2010. GE Healthcare IT has seen the greatest decrease in usage since 2010.

How Satisfied are Participants with their Current EHR Platform?

Among the most used EHR platforms, Practice Fusion and Amazing Charts users are most satisfied. All the top EHR platforms were rated between Fair and Very Good, with no platform scoring as Poor or Excellent.

	Epic Systems (n=191)	Allscripts (n=187)	eClinical Works (n=116)	NextGen Healthcare (n=85)	Cerner (n=74)	GE Healthcare (n=59)	McKesson (n=42)	Practice Fusion (n=37)	Meditech (n=27)	Amazing Charts (n=26)	
Overall Satisfaction											<ul style="list-style-type: none"> - Poor - Fair - Good - Very Good - Excellent

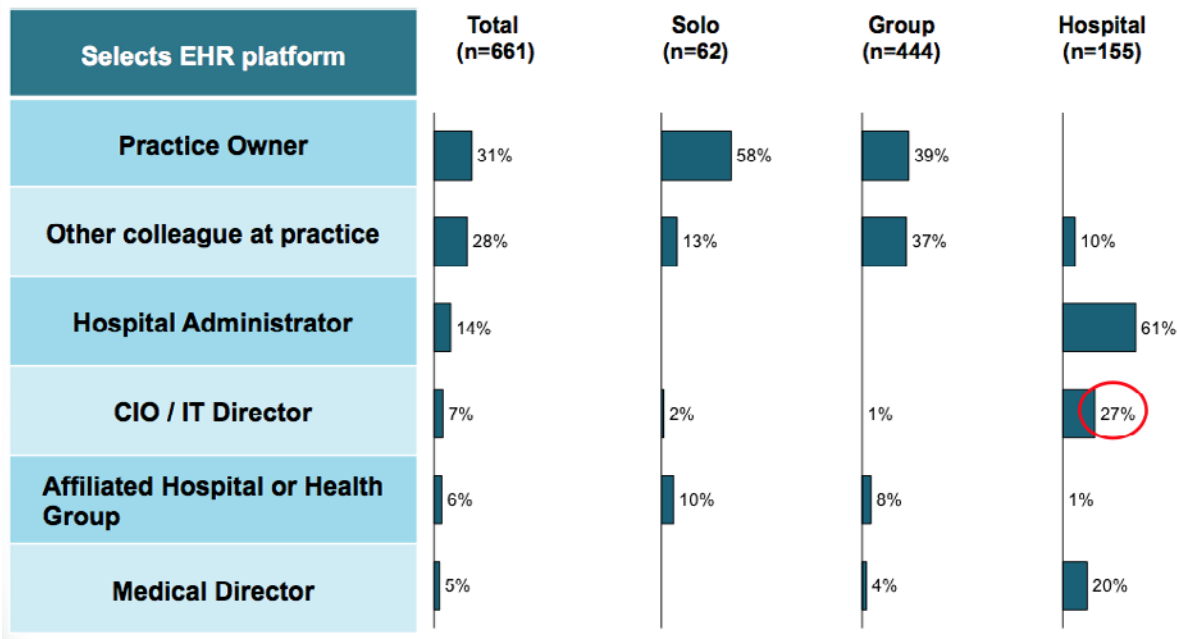
On average, respondents view a total of four platforms during the selection process. Ease of use, cost, and the ability to customize the platform are the overall most important factors when selecting the EHR platform. Users of each platform assigned different importance rankings to the various attributes, providing insight to the areas where each platform is strongest.

Factors	Epic Systems (n=52)	Allscripts (n=93)	eClinical Works (n=66)	NextGen Healthcare (n=30)	Cerner (n=20)	GE Healthcare (n=21)	McKesson (n=23)	Practice Fusion (n=30)	Meditech (n=6)	Amazing Charts (n=22)
Ease of use										
Cost										
Ability to customize										
Compatibility with IT infrastructure										
Post-purchase support										
Training										
Ease of use of data										
Number of applications										
Prior experience										

- Of little importance
- Unimportant
- Moderately important
- Important
- Very important

Who is Responsible for EHR Platform Selection?

In the hospital setting, the CIO/IT Director is involved in the EHR selection process more than one-quarter of the time (27%).



Why Have Some Participants Switched EHR Platforms?

Nearly eight of ten respondents are using their first EHR platform (79%). Among healthcare professionals who switched from another platform, only two of ten have switched due to poor performance (21%).

Reasons for switch (Top Responses)	Total (n=254)
Changed practice location	20.9%
Not happy with prior platform	10.6%
Upgrade	10.2%
Institutional decision	10.2%
Vendor went out of business	8.3%