What is the MarketScape for Ambulatory EHR/EMR?

Judy Hanover
Research Director, Provider IT Strategies
IDC Health Insights

With the passing of the HITECH Act in February of 2009, providers gained an unprecedented opportunity to receive incentive payments for implementing and using eligible electronic health and medical records (EHR/EMRs) under the conditions laid out in the law. In order to take advantage of the subsidies, providers must implement and demonstrate meaningful use of the EMR technology by specific deadlines, and successful providers started receiving incentive payments for meeting Phase 1 meaningful use objectives in April 2011. With Phase 2 and 3 meaningful use coming up quickly, alongside 5010 and ICD-10 implementation and additional IT requirements for accountable care, properly implementing an ambulatory EHR/EMR as the foundation of healthcare provider infrastructure has never been more important.

In past years, IDC Health Insights has provided the Short List report to ambulatory EHR/EMR buyers making decisions about technology, but the 2011 report will be revised using IDC's MarketScape methodology. The MarketScape methodology is three-dimensional, allowing us to take into account not only current capabilities, but also the product's future strategy, alongside the current market share. In the current EHR/EMR environment, the emphasis is moving away from functionality and certification (although these are still important), and toward a strategic approach to meaningful use in the short term, and accountable delivery in the long term, making the analysis well-suited for the forward-looking MarketScape methodology. We will be publishing two new MarketScape reports in coming months, covering technology providers with offerings for large and mid size practices, followed by technology providers for small practices.

The methodology of the MarketScape report is designed to provide an objective analysis of the ambulatory EHR/EMR space that will assist providers in determining the technology and vendor best suited to their practices, existing IT environment and business needs. Key recommendations for practices selecting EHR/EMR include:

- Ambulatory EHR/EMR buyers should consider the readiness of providers, workflow and human factors when making decisions surrounding EHR/EMR selection, implementation and ongoing use
- Ambulatory EHR/EMR buyers should look for integrated solutions that incorporate certified EHR/EMR technology with the analytics and revenue cycle management capabilities that will be needed to improve outcomes and prepare for accountable care, 5010 and ICD-10 implementation
- Ambulatory EHR/EMR buyers should consider the total cost of ownership for an EHR/EMR solution when budgeting for projects, including not only the software license, but also the infrastructure and services that will be required to deliver the

required performance from the application and move providers to adoption levels required for meaningful use

- Ambulatory EHR/EMR buyers should consider hosted and software-as-a-service delivery in addition to traditional installed applications, as these delivery models may offer advantages to many practices and help to prepare for operating as networked organizations under accountable care

The vendors who will be covered in the 2011 IDC Health Insights MarketScape include a sample of the ambulatory EMR vendors supplying solutions. In our research, we found over 150 vendors, and were forced to narrow down the field to create a representative sample for this report. The list of vendors we will cover includes established market share leaders as well as smaller vendors with compelling applications and delivery models. Please feel free to email me at jhanover@idc.com with any questions about the forthcoming MarketScape reports.

Visit the IDC Health Insights Community at http://idc-insights-community.com/health.