



PHYSICIAN OFFICE CLINICAL MANAGEMENT SYSTEMS

A Survey of Fifty-Five Primary Care Physicians and Specialists

Panel Intelligence, LLC
March 2008

STUDY DESCRIPTION

Topic	Physician Office Clinical Management Systems
Respondent Type	Physicians
Specialties Covered	Primary care physicians/internists and assorted office-based specialists
Region	United States Only
Methodology	Online survey, self-administered via Panel Intelligence website Duration: 20 minutes Size: 60 respondents Fielding Dates: March 17-18, 2008

OBJECTIVES

To understand physician purchasing patterns with regard to in-office clinical management systems.

- Determine influence of economy (including lessening availability of credit) on physician office spending generally, and with regard to clinical management systems; determine priority items.
- Quantify spending in comparison to previous year.
- Determine extent and timing of hospital involvement in selection and purchasing of physician office clinical management systems in the context of recently relaxed Stark Laws.
- Understand need for compatibility with hospital systems.
- Understand purchase and leasing models and prevalence of each.
- Measure product perception, switching behavior, and barriers to switching/sticky-ness.
- Compare and contrast products (including product recommendations).
- Understand future purchasing/upgrades/potential to upgrade product modules.

KEY FINDINGS

- **70% Utilize Purchase Model to Obtain Clinical Management System.** 20% have employed a leasing model, while less than 10% utilize an ASP model.
- **Operational and Capital Spending Up From Last Year.** 68% of physicians have seen increasing operational spending; the same percentage has experienced increased capital spending.
- **Challenging Economy Affects Caseload and Profitability, Discouraging CMS Spending for Some.** Surveyed physicians ranked operational spending on supplies as the first target for cutbacks. 29% indicated that difficult economic times hurts their caseload, 44% profitability. 55% of physicians stated that difficult economic times discouraged CMS purchasing, 71% said it discouraged CMS upgrades.
- **Still, One Third Expect to Be in the Market For Purchasing/Upgrade.** 31% of respondents expect to purchase a new system, or upgrade an existing system within the next three years. Of these, more than half (59%) expect this to happen in 2010.
- **Mixed Interaction with Hospitals on CMS Adoption.** The group was split in thirds on the amount of interaction with the hospital during this process: weak or minimal interaction, medium interaction and close interaction. It appears that this is a case-by-case situation depending on the hospital and the practice. 34% stated that they must purchase the same brand or a compatible product as the hospital.
- **One Third of Physicians Now Expect Financial Support from Hospital for CMS Adoption.** 36% stated that they personally would expect financial support – an average of 48% the cost of the system. They believed that this is less common nationally, with 22% suggesting that hospital are contributing financially – an average of 20% of the cost.
- **Majority of Physicians Define CMS Switching as Difficult.** 56% stated that it would be difficult to switch systems, 20% stated it would be easy. Common reasons for difficulty include price and training needs.
- **CMS Products Rather Undifferentiated.** On a rating scale of 1-7, all 16 rated products received a mean score between 4.2 and 4.8, indicating mostly neutral opinion. Nonetheless, 69% of respondents would recommend their current CMS product to a physician friend or colleague.

Inclusion Criteria and Respondent Demographics

Inclusion Criteria	<ul style="list-style-type: none"> ▪ US-based ▪ 2 to 30 years of experience post-training ▪ Minimum of 75% professional time spent in clinical practice ▪ Use in-office clinical management systems and familiar with these systems
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Question S1

What is your primary medical specialty?

n = (55)	% of Respondents	Number of Respondents
Internal Medicine	43.6%	24
Family Practice	1.8%	1
General Practice	7.3%	4
Office-based specialist (e.g. neurology, gastroenterology, etc.)	47.3%	26

Question S2

What is your primary work setting?

n = (55)	% of Respondents	Number of Respondents
Solo Private Practice	34.5%	19
Group Private Practice	65.5%	36

Questions S3

What percentage of your professional time is spent in clinical practice?

n = (55)	Mean	Median	Minimum	Maximum	Standard Deviation
Professional time is spent in clinical practice	97.4%	100.0%	80%	100%	4.4%

Question S4

How long have you been in practice post-training?

n = (55)	Mean	Median	Minimum	Maximum	Standard Deviation
Years in practice post-training	13.7	12	3	27	6.6

Question S5

Does your practice use Clinical Management System (CMS) software?

n = (55)	% of Respondents	Number of Respondents
Yes	100.0%	55

Question S6

Are you familiar with your practice's CMS software?

n = (55)	% of Respondents	Number of Respondents
Yes	100.0%	55

Question S7

Were you involved in the selection process for this software?

n = (55)	% of Respondents	Number of Respondents
Yes	100.0%	55

SECTION ONE: PRACTICE BACKGROUND AND SPENDING TRENDS

Question Q1

Based on patient volume, how busy is your practice today compared to the same time last year?

n = (55)	% of Respondents	Number of Respondents
More than 20% busier than before	16.4%	9
Between 15% and 20% busier than before	27.3%	15
Between 10% and 14% busier than before	14.5%	8
Between 5% and 9% busier than before	18.2%	10
Between 2% and 4% busier than before	1.8%	1
Similarly busy (Less than 2% more busy or less busy)	12.7%	7
Between 2% and 4% less busy than before	3.6%	2
Between 5% and 9% less busy than before	1.8%	1
Between 10% and 14% less busy than before	1.8%	1
Between 15% and 20% less busy than before	1.8%	1
More than 20% less busy than before	0.0%	0

Question 2a

How does the routine operational spending in your practice from March 2007 – March 2008 compare with the amount spent between March 2006 and March 2007?

Trend in routine operational spending n = (55)	% of Respondents	Number of Respondents
More than 20% than previous year	12.7%	7
Between 15% and 20% more than previous year	14.5%	8
Between 10% and 14% more than previous year	10.9%	6
Between 5% and 9% more than previous year	18.2%	10
Between 2% and 4% more than previous year	14.5%	8
Similar to previous year (less than 2% more or less spending)	21.8%	12

Continued...

Trend in routine operational spending n = (55)	% of Respondents	Number of Respondents
Between 2% and 4% less than previous year	1.8%	1
Between 5% and 9% less than previous year	1.8%	1
Between 10% and 14% less than previous year	0.0	0
Between 15% and 20% less than previous year	1.8%	1
More than 20% less than previous year	1.8%	1

Question 2b

How does the capital spending in your practice from March 2007 – March 2008 compare with the amount spent between March 2006 and March 2007?

Trend in capital spending n = (55)	% of Respondents	Number of Respondents
More than 20% than previous year	14.5%	8
Between 15% and 20% more than previous year	9.1%	5
Between 10% and 14% more than previous year	14.5%	8
Between 5% and 9% more than previous year	12.7%	7
Between 2% and 4% more than previous year	20.0%	11
Similar to previous year (less than 2% more or less spending)	23.6%	13
Between 2% and 4% less than previous year	1.8%	1
Between 5% and 9% less than previous year	3.6%	2
Between 10% and 14% less than previous year	0.0	0
Between 15% and 20% less than previous year	0.0	0
More than 20% less than previous year	0.0	0

Question Q3

Assume a scenario in which your practice is forced to curb spending over the next 12 months.

Please rank the following areas in the order in which cutbacks would occur where (1 = first to undergo cutbacks, 2 = second to undergo cutbacks, and so on).

n = (55)	Mean Rank
Operational spending: less expensive supplies or less use of supplies	2.6
Operational spending: reduce staffing / use less expensive staffing	3.6
Operational spending: less use of outside services	3.7
Capital spending: reduce facility/building/office upkeep	4.1
Capital spending: scale back purchase of IT equipment / computer hardware	4.3
Capital spending: scale back software purchases / upgrades	4.4
Operational spending: reduce hours of operation	5.4

Question Q4

Please rate your perception of the current state of the US national economy

n = (55)	Mean	Negative (1-3)	Neither Negative or Positive (4)	Positive (5-7)
Percentage of perception of the current state of the US national economy	2.8	65.6%	21.8%	12.7%

Question Q5

In your opinion, is your practice's caseload or profitability affected by difficult economic times?

n = (55)	Strongly impacted by the economy	Somewhat impacted by the economy	Little to no impact from the economy
Caseload	29.1%	54.5%	16.4%
Profitability	43.6%	52.7%	3.6%

Question Q6

Is your practice's purchasing or leasing of Clinical Management Systems affected by difficult economic times?

Difficult Economic Times:

n = (55)	% of Respondents	Number of Respondents
Encourage physician office interest in purchase of CMS	14.5%	8
Discourage physician office interest in purchase of CMS	54.5%	30
Does not affect physician office interest in purchase of CMS	30.9%	17

n = (55)	% of Respondents	Number of Respondents
Increases sensitivity to CMS price	69.1%	38
Decreases sensitivity to CMS price	18.2%	10
Does not influence sensitivity to CMS price	12.7%	7

n = (55)	% of Respondents	Number of Respondents
Encourages upgrades to existing CMS systems	9.1%	5
Discourages upgrades to existing CMS systems	70.9%	39
Does not influence the decision to upgrade	20.0%	11

n = (55)	% of Respondents	Number of Respondents
Encourage leasing/ASP models over purchasing	38.2%	21
Encourage purchasing over leasing/ASP models	10.9%	6
Neither	50.9%	28

Question Q7

Does the existing 'credit crunch' in the financial markets (lessening of availability of loans/financing and/or more challenging interest rates) hinder your ability to purchase capital equipment? Does it affect your purchasing/upgrading of CMS in your office?

Does the credit crunch affect your ability to make capital purchases?

n = (55)	% of Respondents	Number of Respondents
Yes, it hinders my ability to make capital purchases	45.5%	25
No, it does not affect my ability to make capital purchases	54.5%	30

Does the credit crunch affect your purchasing/upgrading of CMS systems?

n = (55)	% of Respondents	Number of Respondents
Yes, it affects purchasing/upgrading	52.7%	29
No, it does not affect purchasing/upgrading	47.3%	26

SECTION TWO: SELECTION OF CLINICAL MANAGEMENT SYSTEMS

Question Q8

When did your practice purchase the Clinical Management System (CMS) that is currently in place?

n = (55)	Median	Minimum	Maximum	Standard Deviation
Practice purchase the Clinical Management System (CMS) that is currently in place	2003/2004	1990	2008	3.8 years

Question Q9

Which company's system is in use in your practice?

n = (55)	% of Respondents	Number of Respondents
A4	0.0%	0
Allscripts	16.4%	9
Athenahealth	1.8%	1
Cerner	7.3%	4
CPSI	0.0%	0
Dairyland	0.0%	0
eClinicalWorks	1.8%	1
Eclipsys	0.0%	0
EPIC	10.9%	6
GE/IDX	9.1%	5
McKesson	3.6%	2
Misys	3.6%	2
NextGen	3.6%	2
Sage	7.3%	4
Siemens	5.5%	3
VitalWorks	1.8%	1
Other	27.3%	15

Questions Q9, Specify

Which company's system is in use in your practice? Other Specify

(n = 15)

ID	Verbatim
4	Quick practice
5	Greenway
6	Open Source VISTA (not Microsoft Vista) same as used by VA System
7	Lytec
9	Amazing Charts
11	Med informatics
13	Care Tracker
16	Data Tec
23	Proprietary
28	Sti
30	Greenway
31	Crowell systems
41	Medical mastermind
42	Micro 4 practice studio
49	Med soft

Question Q10

In the context of newly relaxed Stark Laws which now allow hospitals to financially assist physicians in adopting CMS/Electronic Medical Records: In your experience, and more broadly around the country, are hospitals currently assisting physician offices financially with CMS purchases or upgrades?

In my personal experience:

n = (55)	% of Respondents	Number of Respondents
I would expect an affiliated hospital to currently contribute _____% of the cost of any such system I would consider purchasing	36.4%	20
I would not expect an affiliated hospital to contribute to the cost of any such system I would consider purchasing	63.6%	35

Personal experience - hospital expected to contribute:

n = (20, contribution expected from hospital)	Mean	Median	Minimum	Maximum	Standard Deviation
% cost expected from hospital	48.1%	50.0%	15%	100%	25.6%

In the context of newly relaxed Stark Laws which now allow hospitals to financially assist physicians in adopting CMS/Electronic Medical Records: In your experience, and more broadly around the country, are hospitals currently assisting physician offices financially with CMS purchases or upgrades?

Around the country, based on what I have seen and heard:

n = (55)	% of Respondents	Number of Respondents
Hospitals are currently contributing _____% of the cost of such systems	21.8%	12
Hospitals are not currently contributing to the cost of such systems	78.2%	43

Around the country - hospital expected to contribute:

n = (12, contribution expected from hospital)	Mean	Median	Minimum	Maximum	Standard Deviation
Currently contributing % of the cost of any such system	20.3%	20.0%	0%	50%	18.2%

In the context of newly relaxed Stark Laws which now allow hospitals to financially assist physicians in adopting CMS/Electronic Medical Records: In your experience, and more broadly around the country, are hospitals currently assisting physician offices financially with CMS purchases or upgrades?

In the short-term (3-9 months), how likely are you to purchase a CMS system on the basis of the relaxation of the Stark Laws?

n = (55)	% of Respondents	Number of Respondents
I am more likely to purchase a CMS system in the short-term	14.5%	8
I am less likely to purchase a CMS system in the short-term	12.7%	7
I am no more or less likely to purchase a CMS system in the short-term	52.7%	29
I did not plan to purchase a CMS system in the short-term and have not had a change in plans	20.0%	11

In the context of newly relaxed Stark Laws which now allow hospitals to financially assist physicians in adopting CMS/Electronic Medical Records: In your experience, and more broadly around the country, are hospitals currently assisting physician offices financially with CMS purchases or upgrades?

In the long-term (9 months - 2 years), how likely are you to purchase a CMS system on the basis of the relaxation of the Stark Laws?

n = (55)	% of Respondents	Number of Respondents
I am more likely to purchase a CMS system in the long-term	27.3%	15
I am less likely to purchase a CMS system in the long-term	10.9%	6
I am no more or less likely to purchase a CMS system in the long-term	49.1%	27
I did not plan to purchase a CMS system in the long-term and have not had a change in plans	12.7%	7

Question Q11

Again, in the context of newly relaxed Stark Laws which now allow hospitals to financially assist physicians in adopting CMS/Electronic Medical Records, how much, if at all, does the hospital (or hospitals) with which you have referral relationships influence your selection of a CMS?

n = (55)	% of Respondents	Number of Respondents
Must purchase same brand of system as hospital	12.7%	7
Must purchase a compatible product, but not necessarily the same brand	21.8%	12
Strongly encourage purchase of a compatible brand, but not required	30.9%	17
Hospital's system does not influence our CMS selection/decision-making	34.5%	19

Question Q12

What model do you employ to operate your clinical management system?

n = (55)	% of Respondents	Number of Respondents
Purchase model + fees – physician office purchases the software (plus ongoing fees such as maintenance)	34.5%	19
Purchase model without fees – physician office purchases software – no ongoing fees	34.5%	19
Lease model – physician office pays for a fixed term of service, followed by a renewal or a removal of the software	20.0%	11
Application service provider model (ASP) – physician office pays per use, payment to provider increases as use of the software increases	9.1%	5
Other	1.8%	1

Questions Q12, Specify

What model do you employ to operate your clinical management system? Other Specify

(n = 1)

ID	Verbatim
6	Open source is no cost to run, start up about \$5500, so irrelevant what hospital does

SECTION THREE: PRODUCT PERCEPTION

Question Q13

Please rate your overall impression, based on your experiences and experiences of your friends and colleagues, with the following company's CMS products

Overall Impression n = (55)	Mean	% Negative (1-3)	% Neutral (4)	% Positive (5-7)	% Cannot Evaluate
A4	4.2	5.5%	34.5%	16.4%	43.6%
Allscripts	4.8	5.5%	27.3%	34.5%	32.7%
Athenahealth	4.5	1.8%	29.1%	21.8%	47.3%
Cerner	4.5	9.1%	21.8%	23.6%	45.5%
CPSI	4.4	3.6%	30.9%	14.5%	50.9%
Dairyland	4.2	5.5%	30.9%	10.9%	52.7%
eClinicalWorks	4.8	3.6%	27.3%	27.3%	41.8%
Eclipsys	4.5	5.5%	23.6%	21.8%	49.1%
EPIC	4.4	7.3%	30.9%	21.8%	40.1%
GE/IDX	4.4	9.1%	30.9%	21.8%	38.2%
McKesson	4.3	7.3%	36.4%	23.6%	32.7%
Misys	4.5	9.1%	27.3%	25.5%	38.2%
NextGen	4.8	1.8%	32.7%	32.7%	32.7%
Sage	4.6	1.8%	34.5%	25.5%	38.2%
Siemens	4.5	7.3%	34.5%	21.8%	36.4%
VitalWorks	4.5	1.8%	40.0%	14.5%	43.6%

Question Q14

Would you recommend your current CMS product to a physician friend or colleague?

n = (55)	% of Respondents	Number of Respondents
Yes	69.1%	38
No	30.9%	17

Questions Q14

Would you recommend your current CMS product to a physician friend or colleague?

Base: Yes, I would recommend the current CMS product to a physician friend or colleague

(n = 38)

ID	Verbatim
1	Saves time and money
2	Have worked well for us
3	Very helpful
5	Excellent practice management platform, easy use for clinicians
6	Very robust, reliable, less cost
8	It works adequately for us
9	Saves time
10	Simple, comprehensive, easy to use
12	Smooth and good support
13	Works well but a little complicated
14	Save time, money, increases efficiency
15	User friendly
16	Great tech support, good on my budget affordable
18	Ease of use
19	Works well for my practice
20	Works well overall and easy to use
22	It works
25	Its reliable
26	Yes, easy to use and has helped in our practice
27	Makes practice easier
29	More user friendly
30	Good support
31	Crowell systems versatile and inexpensive
32	Fairly easy to use, once up and running
33	Efficient
34	Easy, effective
36	Effective, cost effective
38	Cost effective

Continued...

39	Logical sequence; clinically relevant
41	Easy to use
44	User friendly
46	User friendly
47	It works
48	Efficient
49	Efficient
52	Well-supported, comprehensive
53	Most popular at my hospital
54	Not great but it works & they fix problems (\$5000/yr service)

Question Q14

Would you recommend your current CMS product to a physician friend or colleague?

(n = 17, would not recommend current CMS)

ID	Verbatim
4	They are similar
7	Not robust and quite expensive
11	Old
17	Lack of support
21	Is too much time to input info, vs hard copy as before
23	Too dependent on single vendor for service
24	Too expensive
28	Very time consuming system
35	High costs
37	Not in its current version although the service is good
40	Too cumbersome
42	It is too expensive the support is lousy
43	Newer systems are easier to use
45	Difficult
50	Expense
51	Slows down clinic pace considerably
55	Too expensive

Question Q15

Do you expect to purchase a new CMS system, or upgrade the current CMS system, within the next three years?

n = (55)	% of Respondents	Number of Respondents
Yes	30.9%	17
No	69.1%	38

Questions Q16

Which new system are you considering installing (including an existing system that you might be considering upgrading, if appropriate):

Base: Expect to purchase a new CMS system, or upgrade the current CMS system, within the next three years

(n = 17)

ID	Verbatim
2	Have not narrowed it down yet, waiting for additional input from hospital
4	Allscrips
5	Greenway
6	Ongoing upgrade of current system-seamlessly
7	Nextgen
9	Amazing charts is simply "amazing" we will continue installing upgrades
11	Next gen
14	To upgrade my existing system
16	I usually get an upgrade /update on mys system quarterly
20	Probably just upgrade as per hospital.
31	Upgrade Crowell system
32	Adding to NextGen
35	Emedical
37	Possible prism. If I am affiliated with a hospital that requires Epic, then I may do that
46	Siemens
48	Unsure
51	Not sure which brands...just starting to think about it

Question Q17

Please provide your best estimates when you anticipate your practice will make the purchase or upgrade.

n = (17, expect to purchase/upgrade within three years)	% of Respondents	Number of Respondents
2008	23.5%	4
2009	17.6%	3
2010	58.8%	10

Question Q18

Why do you anticipate no purchases or upgrades in the next three years?

(n = 38, no purchase/upgrade expected within three years)

ID	Verbatim
1	I made a big payment on my system
3	No need for upgrades
8	We feel we will be able to manage with existing software over the next 2-3 years
10	Happy with current system. Cost is a major factor.
12	Limiting outlay of capital
13	Just got new system
15	Hospital may purchase
17	Working on system
18	Happy with current system
19	Cost and no problem w present system
21	Have 5 year lease
22	System works
23	Still breaking in our current software.
24	Expense
25	I just purchased system 8 years ago.
26	My current program is up-to-date
27	Depends on the budget
28	New system

Continued...

29	Financial reasons
30	No
33	Cost
34	Currently satisfied with status quo
36	Our software is new!
38	Our current system is new
39	We have just purchased the ems
40	We are going to try another system
41	Just purchased system
42	I am still paying for this one
43	Cost of upgrade
44	Financial issues
45	No
47	It works
49	Satisfied
50	Expense
52	My mistake - yes i plan on upgrading
53	Adequate now; no extra dollars
54	Ok w/current and it is a hassle to change; we did it once
55	Finances are tight

Question Q19a

Please rate the ease or difficulty of switching vendors once you have committed to one vendor.

n = (55)	Mean	% Difficult (1-3)	% Neutral (4)	% Easy (5-7)
Ease or difficulty of switching vendors once you have committed to one vendor	3.2	56.4%	23.6%	20.0%

Questions Q19b

Please elaborate as to why you made your selection above.

(n = 55)

ID	Verbatim
1	Still need to maintain older purchases
2	The software data may not be compatible and makes it difficult to use another vendor
3	No difficulty
4	Depending on vendor may be difficult or easy to download your current patients
5	It has been somewhat complicated to switch our system over
6	Everyone has proprietary stuff & wants to make the sale
7	Will transition slowly
8	We would have to educate staff in use.
9	What is so great about amazing charts is that you have no vendor ; directly from the company.
10	Huge time spent with learning new system, customer support to work out bugs, transition disruptive to patient care
11	Do what we need to do
12	Compatibility issues
13	Need to incorporate all patients...lose data
14	It is difficult because you usually has more confidence with that vendor
15	New vendor expedited and facilitated well
16	Cost, transfer of data
17	Expense
18	More labor intensive for staff
19	Never had to switch
20	You get used to one system but like all else, eventually you adjust.
21	We signed a contract for 5 yrs
22	Used to the current system
23	Can't transfer databases to another system since each so different.
24	Change of software
25	Many competitive programs available. each with many good features.
26	I haven't tried, so cant comment on it
27	Customer service is excellent
28	Difficult transition in past

Continued...

29	Discounted price
30	Good support
31	Versatile system yet not the most expensive
32	Many different products, different levels of support
33	Online reviews recommended by friend
34	There are certainly growing pains given the upsurge of technology
35	Because we want to keep same vendors
36	Not a main issue
37	There always seem to be glitches when transferring data. additionally, the staff has difficulty with the transition
38	No long term relationship established
39	The training process and insertion of data take a great deal of time
40	Very difficult since you are locked in
41	Difficult to change all data
42	Because yu pay out all this money and for what
43	The are usually not compatible
44	There are many
45	Not interested
46	There may be compatibility issues with system in place. will need retraining of the staff on the new system.
47	No compatibility
48	Proprietary software integrating billing and records
49	Complex learning curve
50	Expensive to switch, reinvent the wheel
51	It is a major upheaval to change emr systems. it causes a near-complete stop to patient flow while staff and physicians learn the new system. that is why I hesitate to switch, although I am not happy with the current system.
52	Integration between emr and practice management system
53	Have never evaluated
54	It took a month last time
55	Propriety system

Question Q20

What, if anything, do you view as the greatest barrier to switching from one CMS product to another?
(n = 55)

ID	Verbatim
1	Transferring data between systems
2	Compatibility
3	Getting used to how to use it
4	Maintaining the data base from old system.
5	Cost and data transfer
6	Everyone has proprietary stuff & wants to make the sale
7	Cost and time
8	Training
9	Price and tech know how.
10	Learning curve
11	Cost
12	Compatibility
13	Time of incorporating old info into new system
14	My lack of knowledge in this kind of technology
15	Cost
16	Cost, transfer of data
17	Nothing
18	Cost
19	Na
20	Ease of use and format
21	Contract
22	Cost
23	Software incompatibility
24	Cost
25	Often products are not able to share data and do not facilitate switching
26	Might have different ways of operation and the old system might not integrate with the new one
27	Transferring info
28	Training staff
29	Cost
30	Office overall

Continued...

31	Creates difficulties in billing and patients chart
32	Compatibility
33	Cost
34	Cost
35	Personnel training, transition from a system to another, migration of the date base
36	None
37	Difficulty of transfer of data and the interaction of one software with another
38	Cost
39	Easier training process
40	Nothing
41	Cost, time involved
42	The cost
43	Down time and difficulty in learning a new system
44	The learning process
45	Na
46	Same issues as mentioned earlier
47	As stated
48	Cost
49	Cost
50	Redoing everything
51	As previous, the learning curve is steep for each cms--they are all very different interfaces.
52	The total integration between the product and our emr
53	Complete incompatibility
54	Incompatibility of some file transfers need to be manually changed
55	Cost of starting over

Question Q21a

In the context of newly relaxed Stark Laws which now allow hospitals to assist physicians adopt CMS/Electronic Medical Records, please rate the amount of interaction and collaboration with hospital colleagues during the selection process and the extent of their involvement.

n = (55)	Mean	Weak Interaction (1-3)	Medium Interaction (4)	Close Interaction (5-7)
Amount of interaction and collaboration with hospital colleagues during the selection process and the extent of their involvement.	3.7	34.5%	34.5%	30.9%

Questions Q21b

Please elaborate on the extent, if any, of this relationship.

(n = 55)

ID	Verbatim
1	I never was approached by my hospital with similar proposals
2	Many patients that are in the hospital we see as outpatients
3	No comments
4	None really
5	The hospital we participate with did not offer any support
6	Hospital irrelevant to open source vista
7	Have met with hospital staff to discuss products
8	Hospitals are somewhat neutral on this
9	None
10	Since our group works at nearby hospitals, the feedback of the physicians there really plays a big role in deciding on a CMS system
11	Need to go on their system
12	Collective bargaining
13	Works with local physician practices
14	I don't have a close relation with the hospital
15	Other mds willing to share info
16	If they are footing the bill, they should have a say
17	Not related
18	Have no dealings at present with hospital
19	NA

Continued...

20	Not much decision.
21	Hospital has no interest in this enterprise
22	Cost savings
23	No relationship
24	Need to collaborate
25	None
26	Should be of interest to both
27	Makes sharing information easier
28	Made decision based on sales presentation
29	None
30	Good
31	NA
32	Little in patient care in ophthalmology
33	Should be minimal
34	I would work fairly closely to adopt a similar cms. an upgrade is more likely however.
35	I think the systems should be same as hospitals in order to tracking properly medical records
36	None
37	I want to hear others in my subspecialty comment on their use of particular software
38	None
39	No collaboration to date
40	No relationship
41	Informal discussions
42	No relationship
43	No strong affiliation with a hospital
44	To ease transition
45	NA
46	Close partnership possible
47	None
48	NA
49	Discussions and experience
50	N/A

Continued...

51	I was previously unaware of this changed law.
52	No real information on this
53	N/A
54	Hospital says it might be willing; other hosp have pd 40%
55	Have no interaction

Product Rating Questions

Please rate brand CMS products on each of the following attributes: - A4

n = (31)	Mean	% Poor (1-3)	% Average (4)	% Excellent (5-7)	Can't Evaluate
Impact on Operational Efficiency	4.8	3.2%	45.2%	38.7%	12.9%
Effectiveness in Managing Clinical Data	4.9	3.2%	41.9%	41.9%	12.9%
Ease of Use	4.8	6.5%	41.9%	38.7%	12.9%
Technical Support	4.8	6.5%	41.9%	35.5%	16.1%
Price	4.0	19.4%	45.2%	22.6%	12.2%

Please rate brand CMS products on each of the following attributes: - Allscripts

n = (37)	Mean	% Poor (1-3)	% Average (4)	% Excellent (5-7)	Can't Evaluate
Impact on Operational Efficiency	4.8	5.4%	40.5%	43.2%	10.8%
Effectiveness in Managing Clinical Data	4.9	8.1%	32.4%	51.4%	8.1%
Ease of Use	4.6	10.8%	43.2%	37.8%	8.1%
Technical Support	4.8	8.1%	37.8%	40.5%	13.5%
Price	4.2	18.9%	37.8%	32.4%	10.8%

Please rate brand CMS products on each of the following attributes: - **Athenahealth**.

n = (29)	Mean	% Poor (1-3)	% Average (4)	% Excellent (5-7)	Can't Evaluate
Impact on Operational Efficiency	4.4	13.8%	44.8%	31.0%	10.3%
Effectiveness in Managing Clinical Data	4.6	10.3%	37.9%	41.4%	10.3%
Ease of Use	4.2	13.3%	51.7%	24.1%	10.3%
Technical Support	4.4	10.3%	44.8%	31.0%	13.8%
Price	4.1	17.2%	48.3%	20.7%	13.8%

Please rate brand CMS products on each of the following attributes: - **Cerner**

n = (30)	Mean	% Poor (1-3)	% Average (4)	% Excellent (5-7)	Can't Evaluate
Impact on Operational Efficiency	4.6	10.0%	43.3%	43.3%	3.3%
Effectiveness in Managing Clinical Data	4.5	10.0%	50.0%	36.7%	3.3%
Ease of Use	4.3	10.0%	56.7%	30.0%	3.3%
Technical Support	4.6	6.7%	40.0%	46.7%	6.7%
Price	4.1	13.3%	56.7%	23.3%	6.7%

Please rate brand CMS products on each of the following attributes: - **CPSI**

n = (27)	Mean	% Poor (1-3)	% Average (4)	% Excellent (5-7)	Can't Evaluate
Impact on Operational Efficiency	4.3	14.8%	48.1%	22.2%	14.8%
Effectiveness in Managing Clinical Data	4.2	14.8%	48.1%	22.2%	14.8%
Ease of Use	4.3	11.1%	48.1%	25.9%	14.8%
Technical Support	4.3	11.1%	48.1%	22.2%	18.5%
Price	4.0	22.2%	40.7%	18.5%	18.5%

Please rate brand CMS products on each of the following attributes: - Dairyland

n = (26)	Mean	% Poor (1-3)	% Average (4)	% Excellent (5-7)	Can't Evaluate
Impact on Operational Efficiency	4.4	11.5%	46.2%	26.9%	15.4%
Effectiveness in Managing Clinical Data	4.2	7.7%	57.7%	19.2%	15.4%
Ease of Use	4.2	11.5%	53.8%	19.2%	15.4%
Technical Support	4.3	11.5%	46.2%	23.1%	19.2%
Price	4.3	7.7%	57.7%	15.5%	19.2%

Please rate brand CMS products on each of the following attributes: - eClinicalWorks

n = (32)	Mean	% Poor (1-3)	% Average (4)	% Excellent (5-7)	Can't Evaluate
Impact on Operational Efficiency	4.6	9.4%	43.8%	31.3%	15.6%
Effectiveness in Managing Clinical Data	4.6	9.4%	43.8%	31.3%	15.6%
Ease of Use	4.6	6.3%	46.9%	31.3%	15.6%
Technical Support	4.5	6.3%	43.8%	31.3%	18.8%
Price	4.2	12.5%	43.8%	28.1%	15.6%

Please rate brand CMS products on each of the following attributes: - Eclipsys

n = (28)	Mean	% Poor (1-3)	% Average (4)	% Excellent (5-7)	Can't Evaluate
Impact on Operational Efficiency	4.1	17.9%	39.3%	21.4%	21.4%
Effectiveness in Managing Clinical Data	4.2	14.3%	42.9%	21.4%	21.4%
Ease of Use	4.2	10.7%	46.4%	21.4%	21.4%
Technical Support	4.2	10.7%	46.4%	21.4%	21.4%
Price	4.0	17.9%	42.9%	17.9%	21.4%

Please rate brand CMS products on each of the following attributes: - **EPIC**

n = (33)	Mean	% Poor (1-3)	% Average (4)	% Excellent (5-7)	Can't Evaluate
Impact on Operational Efficiency	4.4	15.2%	36.4%	33.3%	15.2%
Effectiveness in Managing Clinical Data	4.6	12.1%	36.4%	36.4%	15.2%
Ease of Use	4.3	18.2%	39.4%	27.3%	15.2%
Technical Support	4.4	15.2%	36.4%	30.3%	18.2%
Price	4.2	18.2%	33.3%	27.3%	21.2%

Please rate brand CMS products on each of the following attributes: - **GE/IDX**

n = (34)	Mean	% Poor (1-3)	% Average (4)	% Excellent (5-7)	Can't Evaluate
Impact on Operational Efficiency	4.4	14.7%	35.3%	32.4%	17.6%
Effectiveness in Managing Clinical Data	4.3	17.6%	38.2%	26.5%	17.6%
Ease of Use	4.2	20.6%	38.2%	23.5%	17.6%
Technical Support	4.2	17.6%	38.2%	23.5%	20.6%
Price	4.1	20.6%	38.2%	20.5%	20.6%

Please rate brand CMS products on each of the following attributes: - **McKesson**

n = (37)	Mean	% Poor (1-3)	% Average (4)	% Excellent (5-7)	Can't Evaluate
Impact on Operational Efficiency	4.4	5.4%	37.8%	32.4%	24.3%
Effectiveness in Managing Clinical Data	4.4	5.4%	40.5%	29.7%	24.3%
Ease of Use	4.4	5.4%	40.5%	29.7%	24.3%
Technical Support	4.2	10.8%	35.1%	27.0%	27.0%
Price	4.1	10.8%	43.2%	24.3%	21.6%

Please rate brand CMS products on each of the following attributes: - **Misys**

n = (34)	Mean	% Poor (1-3)	% Average (4)	% Excellent (5-7)	Can't Evaluate
Impact on Operational Efficiency	4.4	8.8%	35.3%	32.4%	23.5%
Effectiveness in Managing Clinical Data	4.4	11.8%	32.4%	32.4%	23.5%
Ease of Use	4.5	5.9%	38.2%	32.4%	23.5%
Technical Support	4.3	11.8%	32.8%	32.4%	23.5%
Price	4.0	17.6%	29.4%	29.4%	23.5%

Please rate brand CMS products on each of the following attributes: - **NextGen**

n = (37)	Mean	% Poor (1-3)	% Average (4)	% Excellent (5-7)	Can't Evaluate
Impact on Operational Efficiency	4.5	8.1%	32.4%	32.4%	27.0%
Effectiveness in Managing Clinical Data	4.5	10.8%	29.7%	32.4%	27.0%
Ease of Use	4.3	10.8%	40.5%	21.6%	27.0%
Technical Support	4.3	8.1%	37.8%	24.3%	29.7%
Price	3.8	21.6%	32.4%	18.9%	27.0%

Please rate brand CMS products on each of the following attributes: - **Sage**

n = (34)	Mean	% Poor (1-3)	% Average (4)	% Excellent (5-7)	Can't Evaluate
Impact on Operational Efficiency	4.4	11.8%	29.4%	32.4%	26.5%
Effectiveness in Managing Clinical Data	4.2	14.7%	32.4%	26.5%	26.5%
Ease of Use	4.2	11.8%	35.3%	26.5%	26.5%
Technical Support	4.2	14.7%	35.3%	23.5%	26.5%
Price	4.0	17.6%	32.4%	23.5%	26.5%

Please rate brand CMS products on each of the following attributes: - **Siemens**

n = (35)	Mean	% Poor (1-3)	% Average (4)	% Excellent (5-7)	Can't Evaluate
Impact on Operational Efficiency	4.2	14.3%	42.9%	22.9%	20.0%
Effectiveness in Managing Clinical Data	4.3	14.3%	42.9%	22.9%	20.0%
Ease of Use	4.2	11.4%	45.7%	22.9%	20.0%
Technical Support	4.3	11.4%	42.9%	25.7%	20.0%
Price	4.0	17.1%	40.0%	22.9%	20.0%

Please rate brand CMS products on each of the following attributes: - **VitalWorks**

n = (31)	Mean	% Poor (1-3)	% Average (4)	% Excellent (5-7)	Can't Evaluate
Impact on Operational Efficiency	4.3	9.7%	41.9%	29.0%	19.4%
Effectiveness in Managing Clinical Data	4.3	9.7%	41.9%	29.0%	19.4%
Ease of Use	4.4	12.9%	38.7%	29.0%	19.4%
Technical Support	4.2	12.9%	41.9%	22.6%	22.6%
Price	4.0	16.1%	41.9%	19.4%	22.6%