MARKET MAP:
A Guide to Understanding the Ambulatory EHR Software Market
The EHR Market is Easier to Understand Than You Might Think

There are over 300 electronic health record (EHR) software vendors in North America, so software buyers can quickly become overwhelmed. This document is designed to help buyers gain perspective on the EHR market, so that they have some context as they start identifying a "short list" of EHRs.

We believe that buyers can quickly understand the market if they learn the five primary criteria that differentiate EHR software products. In this presentation, we'll "break it down" by explaining each of the five key segmentation criteria.

Afterwards, you'll be ready to prioritize your requirements and build a short list.
Different Vendors Serve Different Specialties

Most EHRs are generic at the core, but offer detailed templates for each specialty they serve. With a larger addressable market, these vendors can afford to invest a lot in their core technology. Other EHRs are designed just for a specific specialty or two. Their narrow market allows them to focus in on their specialty's unique needs.

For example...

<table>
<thead>
<tr>
<th>Specialty</th>
<th>aprima</th>
<th>GE Healthcare</th>
<th>GREENWAY</th>
<th>AdvantaChart</th>
<th>gMed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary care</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Cardiology</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Gastroenterology</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Obstetrics / gynecology</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Orthopedics</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>
Different Vendors Serve Different Sizes of Practices

Like Goldilocks and her porridge, EHR buyers will want to implement a system that is a good fit for their size of practice.

If a large practice implements an EHR designed for small practices - probably because it was less expensive - that practice will likely experience poor performance ("This software is so slow!") and functional deficiencies ("What do you mean it can't do that?").

Meanwhile, if a small practice implements a system designed for large groups, they will probably pay too much, face cost-prohibitive IT maintenance burdens and become overwhelmed with so many features - most of which they don't need to use.

The challenge from the buyer's side is that most of the big brand names they recognize are designed for large practices or hospitals. Conversely, price sensitivity often leads buyers to low cost systems that lack features, support or viability.

There is no simple answer here. However, as you review the market, try to categorize which vendors are right for which size of practice. Ask vendors how many customers they have that are similar in size to your practice.

Find EHRs that serve your size of practice
Vendors Differ by the Types of Applications They Offer

Many buyers stumble when trying to identify the vendors that offer the applications they need. "Stand-alone EHRs" offer powerful clinical applications, but typical don't offer practice management applications for billing or scheduling. Instead, they integrate to your existing practice management software or billing services provider.

Meanwhile, "integrated suite EHRs" offer the clinical and practice management applications in a single system, thereby avoiding duplicate data entry or software integration challenges. Think about what's more important to you: having everything in one seamless system, or preserving your existing investment in practice management software. It's a tough choice and an important one.

Download: EHR Feature Comparison Checklist
"Deployment model" refers to where the software is installed and how it is accessed. There is a substantial shift underway in how software is deployed, so understanding the various deployment models is important.

A traditional "on-premise" system (aka "client/server") is installed on a server at your office, as well as on each user's computer. Meanwhile, in the newer "web-based" model (aka "Software-as-a-Service" or "SaaS"), the software is hosted in a secure, off-site data center and users access the system through their web browsers. The SaaS model is similar to using a website. There are also hybrid models, such as when a traditional client/server system is deployed with the "client" software installed on each user’s computer, but the "server" software is hosted at the software vendor's data center.

The on-premise model is certainly more entrenched and familiar. However, the software market overall appears to be evolving toward the more modern SaaS model. At Software Advice, we find that roughly 25% of buyers prefer an on-premise program, 25% prefer a web-based system, and the final 50% are considering both deployment methods. Each deployment model will have unique advantages and potential challenges, so it's important to fully understand each.
Comparing Deployment Models

ON-PREMISE
- Installed at your practice
- Often an “up-front” purchase
- A Windows look & feel
- Traditional & familiar

WEB-BASED
- Hosted in a data center
- Priced as a subscription
- A Web page look & feel
- New, emerging model
There is a wide range of EHR pricing, from $995 “shrink wrapped” programs to six-figure enterprise applications. To some extent, you get what you pay for. Below we illustrate in a fairly simplistic chart the tradeoffs at various all-inclusive price ranges.

<table>
<thead>
<tr>
<th>EHR Price Ranges</th>
<th>Low ($1,000 to $5,000 per doctor)</th>
<th>Medium ($10,000 to $30,000 per doctor)</th>
<th>High (Over $30,000 per doctor)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Functionality</strong></td>
<td><img src="/images/low-functionality.png" alt="Low" /></td>
<td><img src="/images/medium-functionality.png" alt="Medium" /></td>
<td><img src="/images/high-functionality.png" alt="High" /></td>
</tr>
<tr>
<td>What features &amp; functions does the EHR offer?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Scalability</strong></td>
<td><img src="/images/low-scalability.png" alt="Low" /></td>
<td><img src="/images/medium-scalability.png" alt="Medium" /></td>
<td><img src="/images/high-scalability.png" alt="High" /></td>
</tr>
<tr>
<td>Can the EHR support one user, a dozen or hundreds?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Integrations</strong></td>
<td><img src="/images/low-integrations.png" alt="Low" /></td>
<td><img src="/images/medium-integrations.png" alt="Medium" /></td>
<td><img src="/images/high-integrations.png" alt="High" /></td>
</tr>
<tr>
<td>Does it integrate to your hospital, medical devices, etc?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Implementation support</strong></td>
<td><img src="/images/low-implementation.png" alt="Low" /></td>
<td><img src="/images/medium-implementation.png" alt="Medium" /></td>
<td><img src="/images/high-implementation.png" alt="High" /></td>
</tr>
<tr>
<td>Is support on-site or by phone / email?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Certifications</strong></td>
<td><img src="/images/low-certifications.png" alt="Low" /></td>
<td><img src="/images/medium-certifications.png" alt="Medium" /></td>
<td><img src="/images/high-certifications.png" alt="High" /></td>
</tr>
<tr>
<td>Is the system ARRA or CCHIT Certified?</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Next Steps for Your EHR Software Search

Now that you understand the five primary criteria that differentiate EHR products, you have the context you need to move to the next step. Use these criteria to define your own detailed criteria.

You'll need to make some decisions, such as:

- What deployment model do you prefer?
- What features and capabilities do you need?
- What is your software budget?

With your requirements defined and these three questions answered, you'll be ready to start building a "short list" of EHR vendors and evaluate each system in-depth.

MORE HELPFUL RESOURCES:

Best Practices:
Download our “Ten Best Practices for Selecting EHR Software”

Requirements Guide:
Download our “EHR Software Requirements Checklist”

FastStart Consultation:
Talk to one of our experts to build a “short list” of EHRs
Want Expert Help Building Your Short List?

Software Advice - the website and the people behind it - is dedicated to helping software buyers find the right software for their organization. Our expertise, in-depth research and easy-to-use website are made available free through the sponsorship of hundreds of software vendors.

Our FastStart Consultations will jump start your software search, saving you weeks of research. A 15-minute phone conversation will get you headed in the right direction and there is no obligation.

"Thanks so much for getting me started on the right track. The prospect of making this kind of investment is overwhelming, and I didn’t have any idea where to start. I think your service is invaluable. Thanks, again…"

Lori Westin
Denver Nephrology

GET A FREE
FastStart Consultation

1. Tell us about your practice & needs
2. Our experts tap their brains & research
3. We send you the perfect “short list”

Learn More
Or call 1-800-918-2764