

MAY 2018

PHYSICIAN OFFICE USAGE OF ELECTRONIC HEALTH RECORDS SOFTWARE

Market Insights Report



PHYSICIAN OFFICE USAGE OF EHR SOFTWARE

	APRIL 2018		MARCH 2017	
CATEGORY	YES %	NO %	YES %	NO %
Overall office adoption	69.6%	30.4%	67.4%	32.6%
BY NUMBER OF PHYSICIANS AT SITE	YES %	NO %	YES %	NO %
1 physician	62.0%	38.0%	60.2%	39.8%
2 physicians	74.6%	25.4%	72.7%	27.3%
3 to 5 physicians	80.4%	19.6%	77.2%	22.8%
6 to 10 physicians	83.5%	16.5%	79.9%	20.1%
11 to 25 physicians	82.9%	17.1%	81.4%	18.6%
26 or more physicians	81.8%	18.2%	78.9%	21.1%
BY NUMBER OF EXAM ROOMS AT SITE	YES %	NO %	YES %	NO %
1 exam room	48.3%	51.7%	44.9%	55.1%
2 exam rooms	71.1%	28.9%	67.9%	32.1%
3 exam rooms	76.4%	23.6%	73.4%	26.6%
4 exam rooms	79.7%	20.3%	76.7%	23.3%
5 exam rooms	81.6%	18.4%	78.7%	21.3%
6 to 10 exam rooms	84.5%	15.5%	81.3%	18.7%
11 or more exam rooms	87.5%	12.5%	84.3%	15.7%
BY AVERAGE DAILY PATIENT VOLUME	YES %	NO %	YES %	NO %
1 to 50 patients	66.3%	33.7%	63.7%	36.3%
51 to 75 patients	82.9%	17.1%	79.9%	20.1%
76 to 100 patients	84.5%	15.5%	79.9%	20.1%
101+ patients	87.9%	12.1%	83.1%	16.9%
BY SITE OWNERSHIP	YES %	NO %	YES %	NO %
Hospital owned	71.6%	28.4%	68.6%	31.4%
Non-hospital owned	69.2%	30.8%	67.1%	32.9%
Health system owned	71.6%	28.4%	70.6%	29.4%
Non-health system owned	68.8%	31.2%	66.2%	33.8%
BY REGION	YES %	NO %	YES %	NO %
North	72.4%	27.6%	70.23%	29.77%
South	71.1%	28.9%	68.94%	31.06%
East	66.4%	33.6%	63.71%	36.29%
West	68.3%	31.7%	66.59%	33.41%

PHYSICIAN OFFICE USAGE OF EHR, CONTINUED

BY PRACTICE SPECIALTY	APRIL 2018		BY PRACTICE SPECIALTY	MARCH 2017	
	YES %	NO %		YES %	NO %
TOP 5 SPECIALTIES			TOP 5 SPECIALTIES		
Aerospace Medicine	80.21%	19.79%	Internal Medicine/Pediatrics	76.42%	23.58%
Internal Medicine/Pediatrics	79.70%	20.30%	Nephrology	75.52%	24.48%
Nephrology	78.04%	21.96%	Aerospace Medicine	75.24%	24.76%
Thoracic Surgery	76.51%	23.49%	Family Practice	74.60%	25.40%
Family Practice	76.47%	23.53%	Urology	74.03%	25.97%
BOTTOM 5 SPECIALTIES			BOTTOM 5 SPECIALTIES		
General Preventative Medicine	49.71%	50.29%	General Preventative Medicine	43.75%	56.25%
Psychiatric	45.62%	54.38%	Psychiatric	43.18%	56.82%
Holistic Medicine	44.95%	55.05%	Holistic Medicine	41.40%	58.60%
Other Specified	41.32%	58.68%	Other Specified	35.11%	64.89%
Forensic Psych	35.14%	64.86%	Forensic Psych	32.50%	67.50%

BY STATE	APRIL 2018		BY STATE	MARCH 2017	
	YES %	NO %		YES %	NO %
TOP 5 STATES			TOP 5 STATES		
Wyoming	78.44%	21.56%	Wyoming	78.59%	21.41%
Iowa	77.88%	22.12%	South Dakota	76.90%	23.10%
South Dakots	77.46%	22.54%	Utah	75.23%	24.77%
Idaho	76.17%	23.83%	Iowa	75.09%	24.91%
West Virginia	75.55%	24.45%	North Dakota	74.23%	25.77%
BOTTOM 5 STATES			BOTTOM 5 STATES		
Louisiana	65.34%	34.66%	New York	62.70%	37.30%
Connecticut	65.32%	34.68%	Louisiana	62.09%	37.91%
New Jersey	63.96%	36.04%	New Jersey	61.63%	38.37%
District Of Columbia	61.79%	38.21%	Rhode Island	58.42%	41.58%
Rhode Island	60.46%	39.54%	District Of Columbia	58.21%	41.79%

EHR VENDOR MARKET SHARE BY PRACTICE SIZE

RANK	VENDOR NAME	NUMBER OF PHYSICIANS IN PRACTICE					OVERALL
		1 to 3	4 to 10	11 to 25	26 to 40	41+	
1	Epic	11.33%	24.37%	36.15%	45.69%	50.18%	14.40%
2	eClinicalWorks LLC	11.27%	8.97%	4.61%	2.81%	1.06%	10.56%
3	Allscripts	6.32%	9.33%	9.76%	8.82%	7.77%	6.91%
4	Practice Fusion	7.66%	1.06%	0.18%	0.20%	0.00%	6.19%
5	athenahealth, Inc	5.31%	4.11%	2.04%	1.60%	1.41%	4.95%
6	NextGen Healthcare	4.16%	6.91%	6.88%	3.61%	3.89%	4.68%
7	Cerner Corporation	3.70%	5.87%	9.14%	10.22%	8.13%	4.23%
8	Greenway Health	3.08%	4.77%	3.36%	0.80%	1.77%	3.35%
9	e-MDs, Inc.	3.54%	1.84%	0.67%	0.40%	0.00%	3.12%
10	GE Healthcare	2.56%	4.89%	6.26%	7.01%	4.59%	3.07%
11	MEDITECH	1.73%	2.14%	3.08%	1.60%	1.06%	1.83%
12	AmazingCharts.com, Inc.	2.16%	0.33%	0.00%	0.00%	0.35%	1.75%
13	Quest Diagnostics Incorporated	1.39%	0.27%	0.18%	0.00%	0.00%	1.14%
14	MEDENT-Community Computer Service Inc.	1.04%	1.28%	0.78%	0.00%	0.00%	1.06%
15	Office Ally	1.32%	0.15%	0.00%	0.00%	0.00%	1.06%
16	HealthFusion	1.22%	0.29%	0.03%	0.00%	0.00%	1.01%
17	Modernizing Medicine, Inc,	1.05%	0.70%	0.18%	0.00%	0.35%	0.95%
18	NexTech Systems Inc.	1.09%	0.44%	0.05%	0.00%	0.00%	0.93%
19	Advanced MD	1.03%	0.37%	0.05%	0.00%	0.00%	0.87%
20	Aprima Medical Software, Inc	0.96%	0.53%	0.23%	0.00%	0.00%	0.85%
	All Other Vendors (483)	28.09%	21.38%	16.36%	17.23%	19.43%	27.07%
	GRAND TOTAL	100%	100%	100%	100%	100%	100%

METHODOLOGY

This report is based on telephone interviews with 297,907 medical offices between March 2017 and March 2018. SK&A call-verifies its entire database of physician offices every six months, or twice annually. The sites represent about 600,000 physicians from 57 practice specialties. Office staff and business managers respond to up to 20 questions related to EHR purchase, usage, brand

and intent. SK&A has been measuring the adoption of electronic health records since 2010 and provides historical data, trending and mapping. EHR adoption variables may be appended to physician contact records. For more information please send inquiries to skasales@us.imshealth.com

Find Out More

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