

A close-up photograph of a doctor's hands in a white lab coat, holding a patient's hand. A blue stethoscope is draped over the doctor's hand. The patient is wearing a light blue hospital gown. In the background, a medical monitor is visible on a stand.

YEAR IN REVIEW

AMBULATORY EMR

EMERGING TRENDS UNCOVER MARKET LEADERS

KLAS® | JANUARY 2015 | PERFORMANCE REPORT

NOTE: Performance scores may change significantly when including newly interviewed provider organizations, especially when added to a smaller sample size like in emerging markets with a small number of live clients. The findings presented are not meant to be conclusive data for an entire client base.

YEAR IN REVIEW

AMBULATORY EMR: EMERGING TRENDS UNCOVER MARKET LEADERS

REPORT AUTHOR: ERIK BERMUDEZ

A lot is happening in the ambulatory EMR market. This report highlights five of the most important findings from KLAS Research in 2014.

1 EMRs STRENGTHEN PATIENT RELATIONSHIPS

Providers indicate that EMRs are most helpful when it comes to strengthening physician/patient relationships outside of the office. EMR capabilities such as patient portals and physician remote access to patient charts allow for more efficient communication and care. Epic scored best in this area, primarily due to their widely adopted patient portal, MyChart.

In contrast, providers feel EMRs hinder their ability to see patients in a timely manner in the office—and don't necessarily enhance the quality of care delivered. Physicians compensate by working additional hours to meet meaningful use requirements and catch up on documentation.

To see how ambulatory EMR vendors impact patient care in other areas, such as clinical outcomes and longitudinal care, [CLICK HERE](#).

IMPACT ON QUALITY OF PATIENT CARE



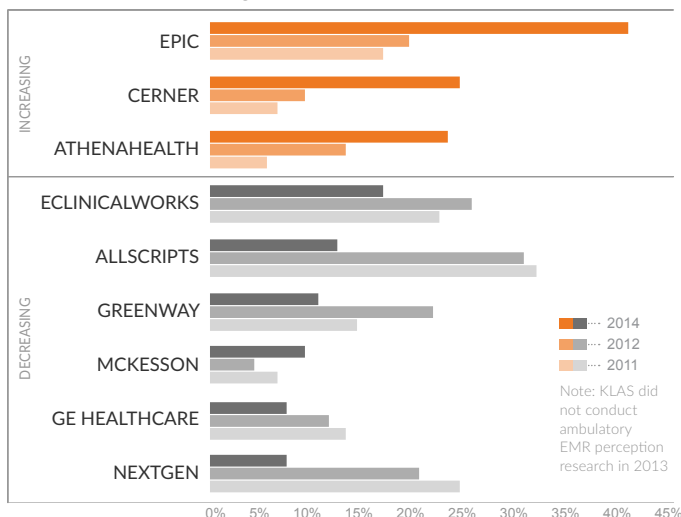
FACILITATING OUTSIDE
PHYSICIAN-PATIENT
INTERACTION

SEEING PATIENTS
IN A TIMELY
MANNER

	FACILITATING OUTSIDE PHYSICIAN-PATIENT INTERACTION	SEEING PATIENTS IN A TIMELY MANNER
EPIC		
GE HEALTHCARE		
ATHENAHEALTH		
ALLSCRIPTS TOUCHWORKS		
CERNER		
GREENWAY		
ECLINICALWORKS		
NEXTGEN		
PRELIMINARY DATA ALLSCRIPTS SUNRISE AMBULATORY CARE		

AMBULATORY MINDSHARE | OVER TIME

Trend of vendors being considered - All Practice Sizes



2 EPIC, CERNER, AND ATHENAHEALTH ARE NEW MINDSHARE LEADERS

Epic, Cerner, and athenahealth compose the new set of ambulatory EMR vendors with the most market mindshare, taking the top three spots from the mindshare leaders in KLAS' last study (2012): Allscripts, eClinicalWorks, and Greenway. Other well-known vendors are decreasing in mindshare and considerations as well. GE and NextGen were the most replaced vendors among providers switching their EMRs.

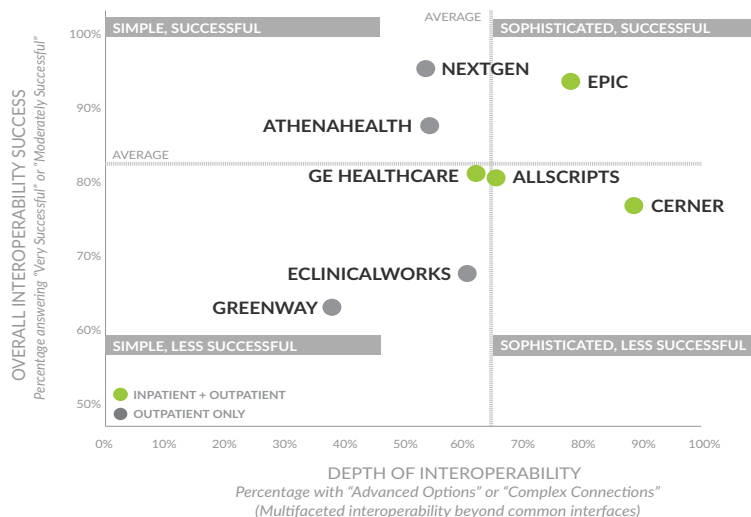
To read more about which vendors are top of mind, which are being replaced, and why, [CLICK HERE](#).

3 PROVIDERS DEFINE THEIR OWN INTEROPERABILITY SUCCESS

Today, providers judge interoperability success based on their specific needs and goals rather than on distance traveled along a common road. Among ambulatory EMRs, athenahealth and NextGen have the highest provider-reported interoperability success rates, and customers point to their vendors' contributions and efforts as reasons for their success.

To understand more about how ambulatory EMR vendors are helping meet providers' interoperability needs, [CLICK HERE](#).

SUCCESS AND DEPTH OF INTEROPERABILITY



4 ECLINICALWORKS MOST USED IN PHYSICIAN-LED ACOs

REACHING ACROSS THE PHYSICIAN-LED ACO LANDSCAPE



To learn more about the role each vendor plays in physician-led ACOs and how well they performed, [CLICK HERE](#).

The number of physician-led ACOs continues to outpace the number of hospital/IDN ACOs. Among physician-led ACOs, eClinicalWorks stands out as the most used EMR vendor across all functional categories, alongside Optum as the most used third-party vendor. On average, if EMR vendors want to be able to compete with third-party vendors, they still have ground to make up concerning the strength of specific ACO functionality and tools.

5 NEXTGEN TOP RATED FOR RCM SERVICES PERFORMANCE

Many providers are opting to outsource their revenue cycle management (RCM) services to their EMR/PM vendor in order to alleviate the administrative stresses caused by today's complex operations. NextGen was the top-rated RCM services vendor, thanks to consistent delivery and effective claims processing. athenahealth also offers strong RCM services in addition to strong ambulatory EMR and PM functionality and support.

How do the quality and transparency of services compare among vendors? [CLICK HERE](#) to find out more.

AMBULATORY SUITE COMPARISON

A = >90 A- = 86-89 B+ = 82-85 B = 78-81 B- = 74-77 C+ = 70-73 C = 66-69 C- = 62-65 D+ = 58-61 D = 54-57 D- = 50-53 F = 50 and below

	RCM*	EMR**	PM**
NEXTGEN	B+	C-	B-
ATHENAHEALTH	B	B	A-
KAREO	C	TBD†	B+
CERNER	C	B-	TBD†
ECLINICALWORKS	B	C+	B-

PRELIMINARY DATA

† NOT YET FULLY RATED BY KLAS.

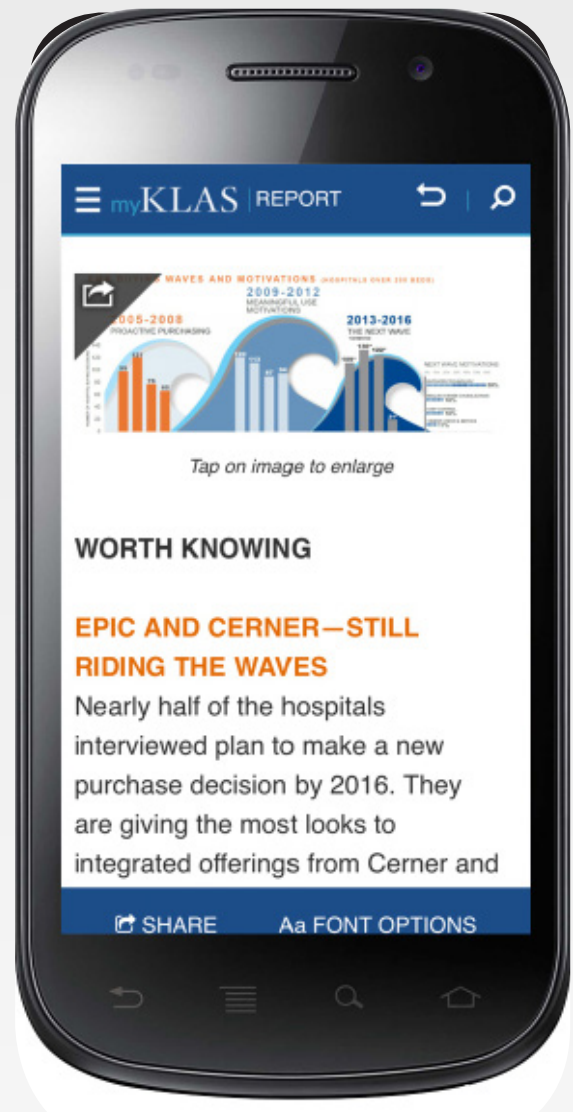
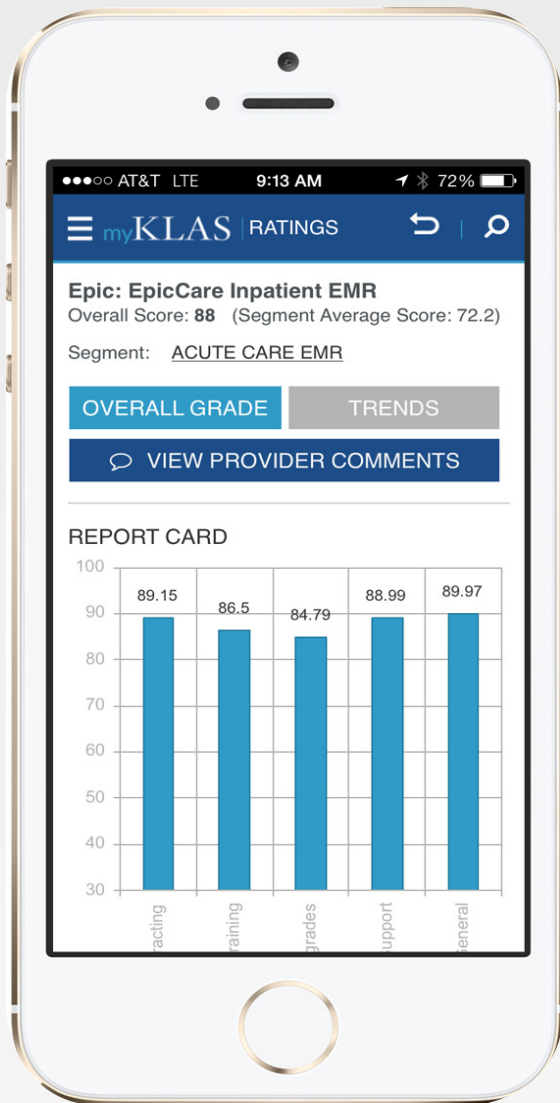
*THE OVERALL RCM SATISFACTION RATING WAS SCALED TO 100 POINTS FOR THIS COMPARISON.

** EMR/PM RATINGS COME FROM SEPARATE DATA SAMPLES.

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