

PLATFORMS IN HEALTHCARE



EHR VENDORS' CAPABILITIES FOR
INTEROPERABILITY

A Chilmark Research Insight Report

ABOUT CHILMARK RESEARCH

Chilmark Research is a global research and advisory firm whose sole focus is the market for healthcare IT solutions. This focus allows us to provide our clients with the most in-depth and accurate research on the critical technology and adoption trends occurring throughout the healthcare sector. Areas of current research focus include among others: Clinician Network Management, Cloud-computing Models for Healthcare, IT-enabled Accountable Care Organizations, Care Coordination, Adoption of Mobile Technology and Consumer-facing Health & Wellness Applications and Services.

Using a pragmatic, evidence-based research methodology with a strong emphasis on primary research, Chilmark Research structures its research reports to serve the needs of technology adopters, consultants, investors and technology vendors. In addition to reports for the general market, Chilmark Research performs research for clients based on their specific needs. Such research has included competitive analyses, market opportunity assessments, strategic assessment of market and vendors for partnership and/or acquisition.

In 2012, Chilmark Research launched its newest service, the Chilmark Advisory Service (CAS). The CAS was created in direct response to clients' request for a continuous feed of research on the most pertinent trends in the adoption and use of healthcare IT. This is an annual subscription that provides not only access to a number of re-search reports throughout the year, but also direct access to Chilmark Research analysts to answer specific client needs. Please contact us directly for further information about CAS.

Chilmark Research is proud of the clients it has had the pleasure to serve including Abbott Labs, Bluetooth Special Interest Group, Catholic Healthcare East, Cerner, HCA, Highmark, IBM, Kaiser-Permanente, McKesson, McKinsey, Microsoft, and Thomson Reuters to name a few. It is our hope that at some future date we will have the pleasure to serve you as well.

Chilmark Research LLC

745 Atlantic Ave, Suite 901
Boston, MA 02111

www.ChilmarkResearch.com

info@chilmarkresearch.com

Ph. 617.615.9344

The information in this report is proprietary to and copyrighted by Chilmark Research. No part of this report may be reproduced or distributed without prior permission of Chilmark Research. The information contained within the report is not intended as a solicitation of an offer to buy or sell any investment or other specific product. All information and opinions expressed in this report were obtained from sources believed to be reliable and in good faith. No representations or warranty expressed or implied is made as to its accuracy or completeness.

TABLE OF CONTENTS

EXECUTIVE SUMMARY

CHAPTER 1 INTEROPERABILITY CHALLENGES THROTTLE HIT INNOVATION

Platform-as-a-Service Defined	10
Rethinking the Need for Liquid Data	11
Fortress EHR Unsustainable.....	11
Background to the Interoperability Challenge in Healthcare	13
FHIR to the Rescue.....	14
Contrarian Views of Healthcare Application-to-Application Data Availability	15

CHAPTER 2 PLATFORM-AS-A-SERVICE AS THE WAY FORWARD

Numerous Limitations Today for PaaS in Healthcare.....	16
--	----

CHAPTER 3 PROFILES OF VENDOR OFFERINGS

ISV Impressions of EHR Vendors.....	19
EHR Vendor Summaries.....	19
Allscripts Healthcare Solutions, Inc.....	21
Conclusion.....	22
Athenahealth, Inc.	23
Conclusion.....	25
Cerner Corporation.....	26
Conclusion.....	27
Epic Systems Corporation	28
Conclusions	30
Greenway Health, LLC	31
Conclusion.....	32
Practice Fusion, Inc.....	33
Conclusion.....	34
Summary of EHR Vendor Efforts.....	35
Overall Conclusions	36



CHAPTER 4 CONCLUSIONS AND RECOMMENDATIONS

Recommendations for EHR Vendors.....	38
Recommendations for Providers.....	39
Recommendations for ISVs	39

APPENDIX 1

Acronyms Used.....	40
--------------------	----

TABLES & FIGURES

EXECUTIVE SUMMARY

Figure 1.1: Healthcare Transformation Requires New Approach to Application Development.....8

CHAPTER 1 INTEROPERABILITY CHALLENGES THROTTLE HIT INNOVATION

Figure 1.1: Service Offerings Compared..... 10
 Table 1.1: Consumer, Enterprise, and Healthcare Computing Compared 12
 Table 1.2: OSS Value to Enterprises 13

CHAPTER 2 PLATFORM-AS-A-SERVICE AS THE WAY FORWARD

Figure 2.1: Service Offerings In and Out of Healthcare 16
 Table 2.2: Salesforce1 Platform 17
 Figure 2.2: Elements of a Healthcare PaaS..... 18

CHAPTER 3 PROFILES OF VENDOR OFFERINGS

Table 3.1: Explanation of Harvey Ball Ratings..... 20
 Table 3.2: Athenahealth REST API Summary 24
 Table 3.3: Athenahealth API Support for Information and Transactions..... 25
 Table 3.4: Highlights of Epic Interoperability Support 29
 Table 3.5: Greenway API Summary..... 31
 Figure 3.1: Vendor Technical Capabilities versus Momentum toward PaaS..... 37

APPENDIX 1

Acronyms Used..... 40





745 ATLANTIC AVENUE, 8TH FLOOR

BOSTON, MA 02111

WWW.CHILMARKRESEARCH.COM

INFO@CHILMARKRESEARCH.COM

PH: 617.615.9344