



2011 Radiology Information System (RIS) Study

September 2011

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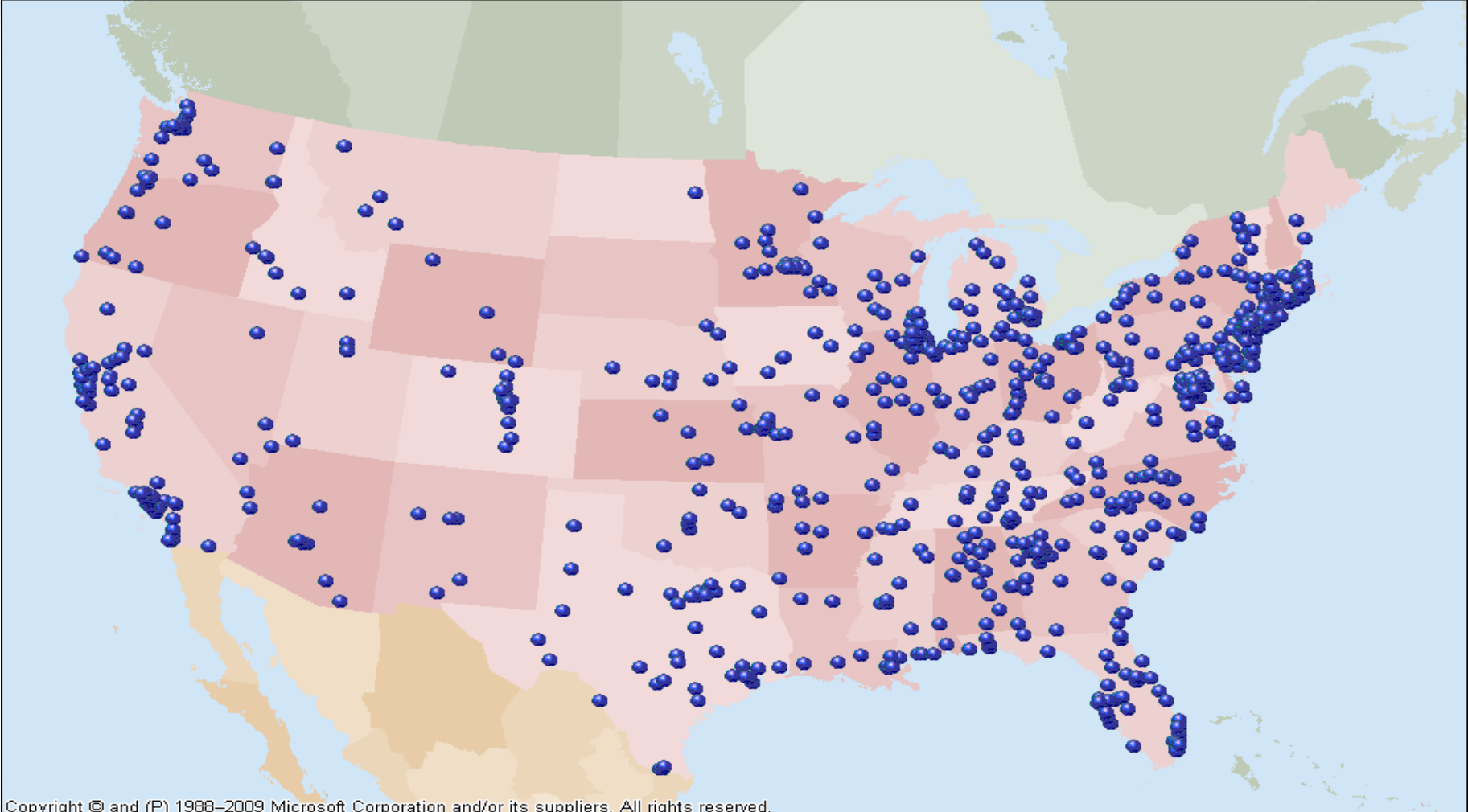
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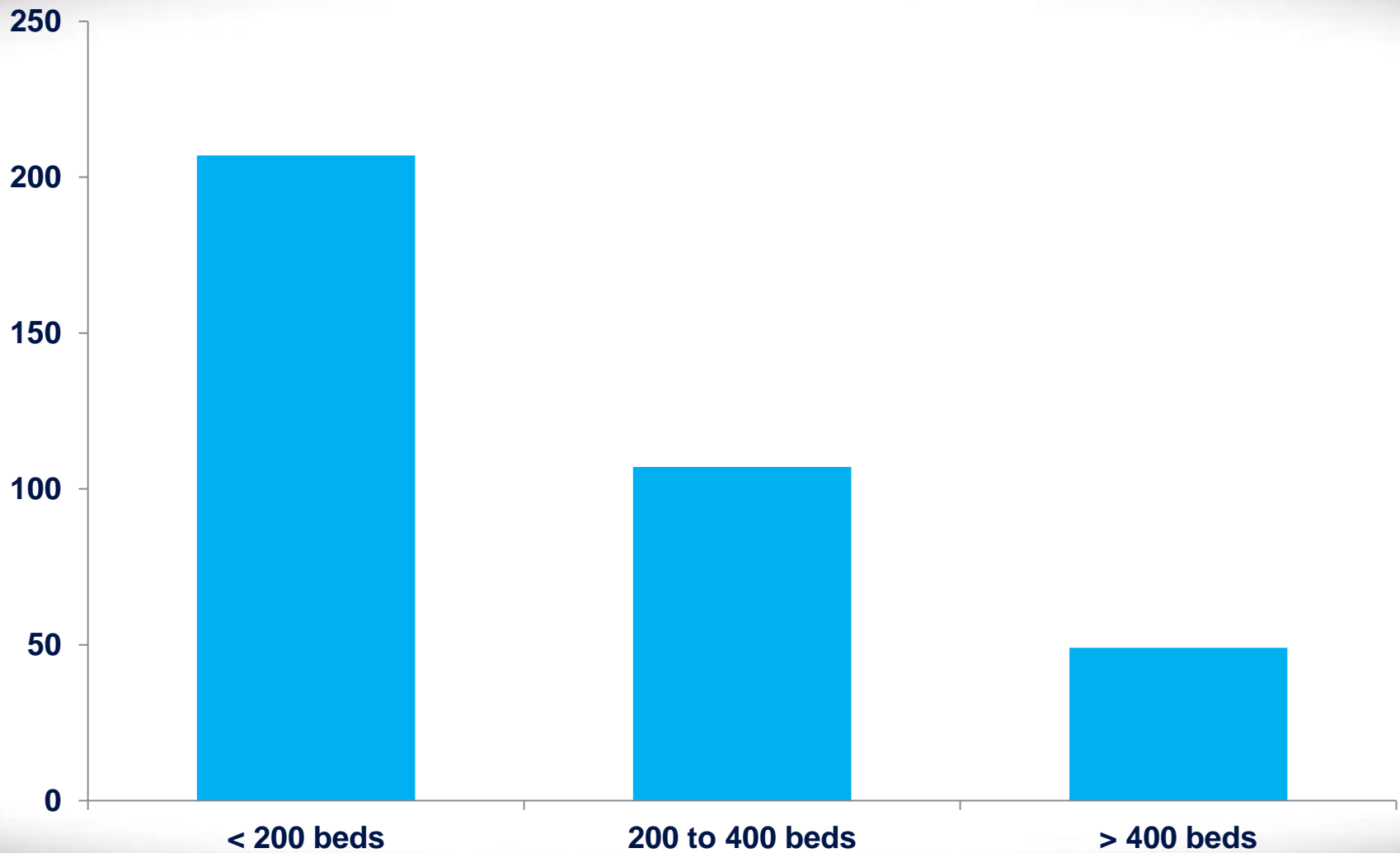
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Study Participant Profile by Geographic Location ($n = 363$)



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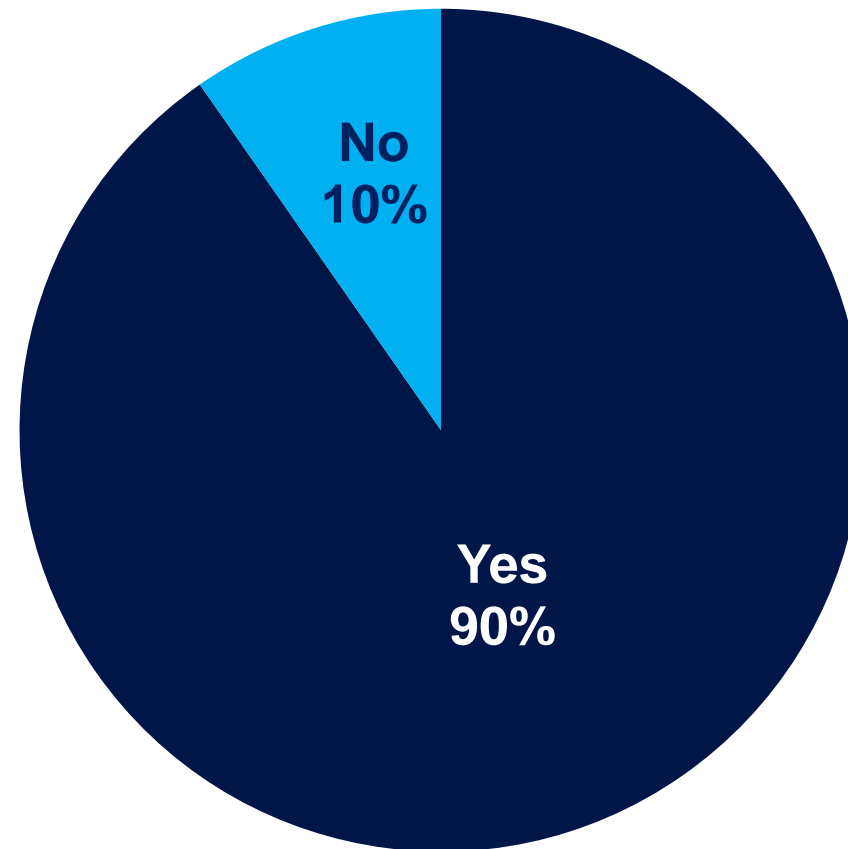
Study Participant Profile by Market Segment



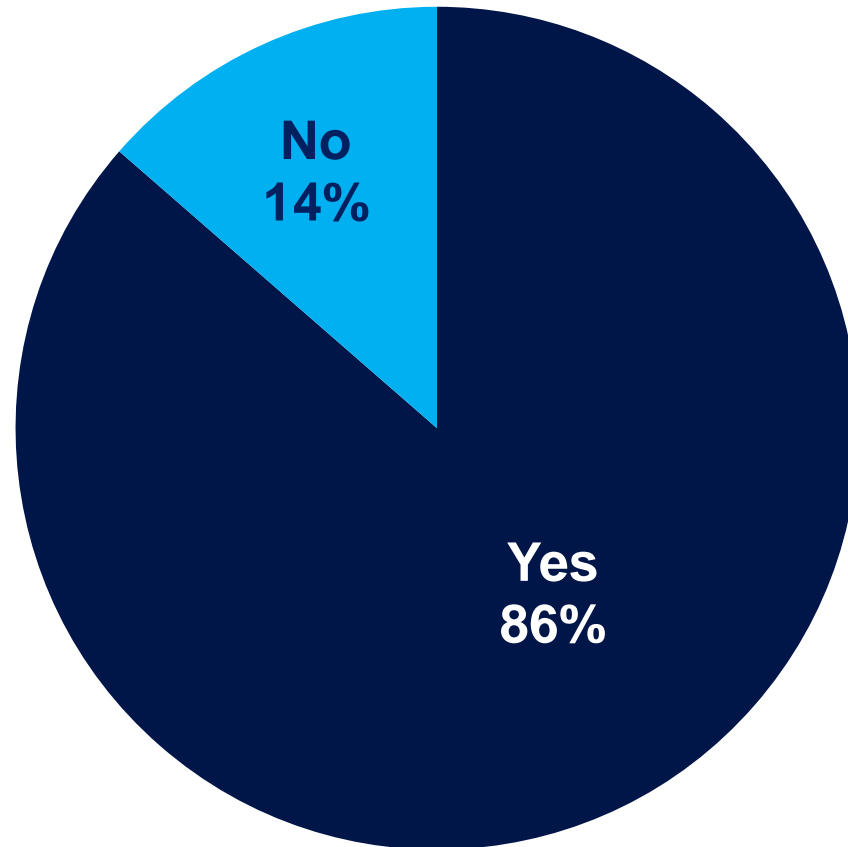


Market Adoption

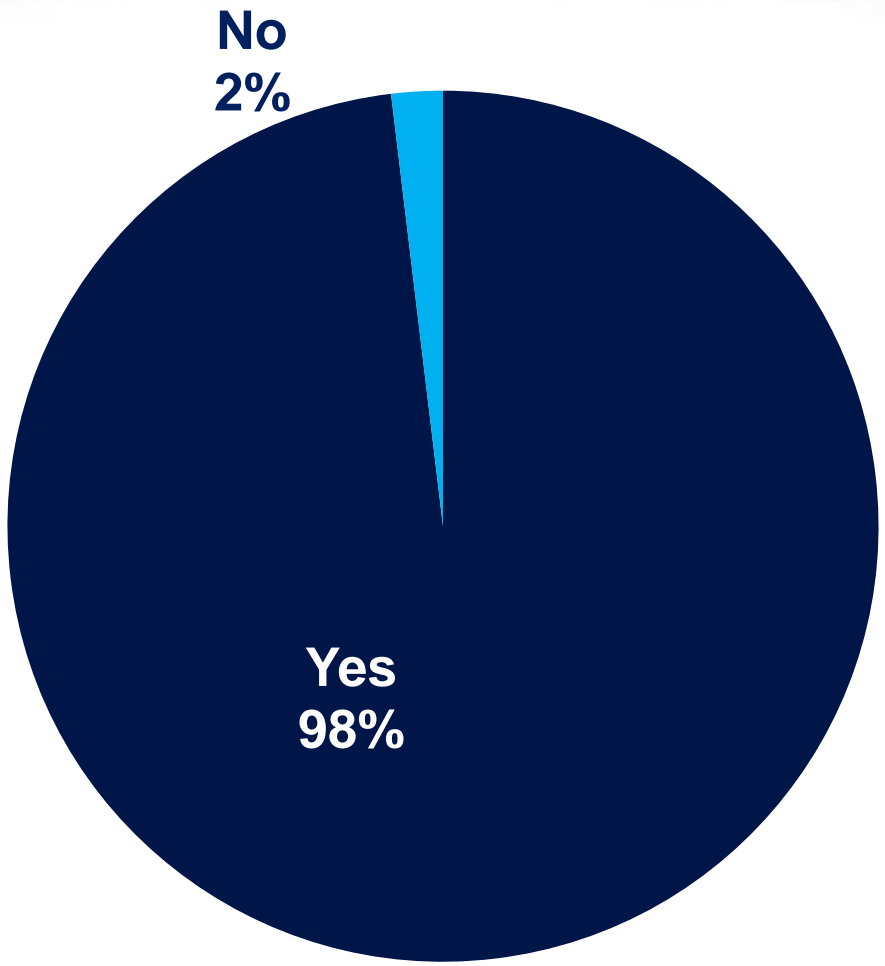
Market Adoption: Do you currently utilize a RIS?



Market Adoption: Do you currently utilize a RIS? (<200 beds)



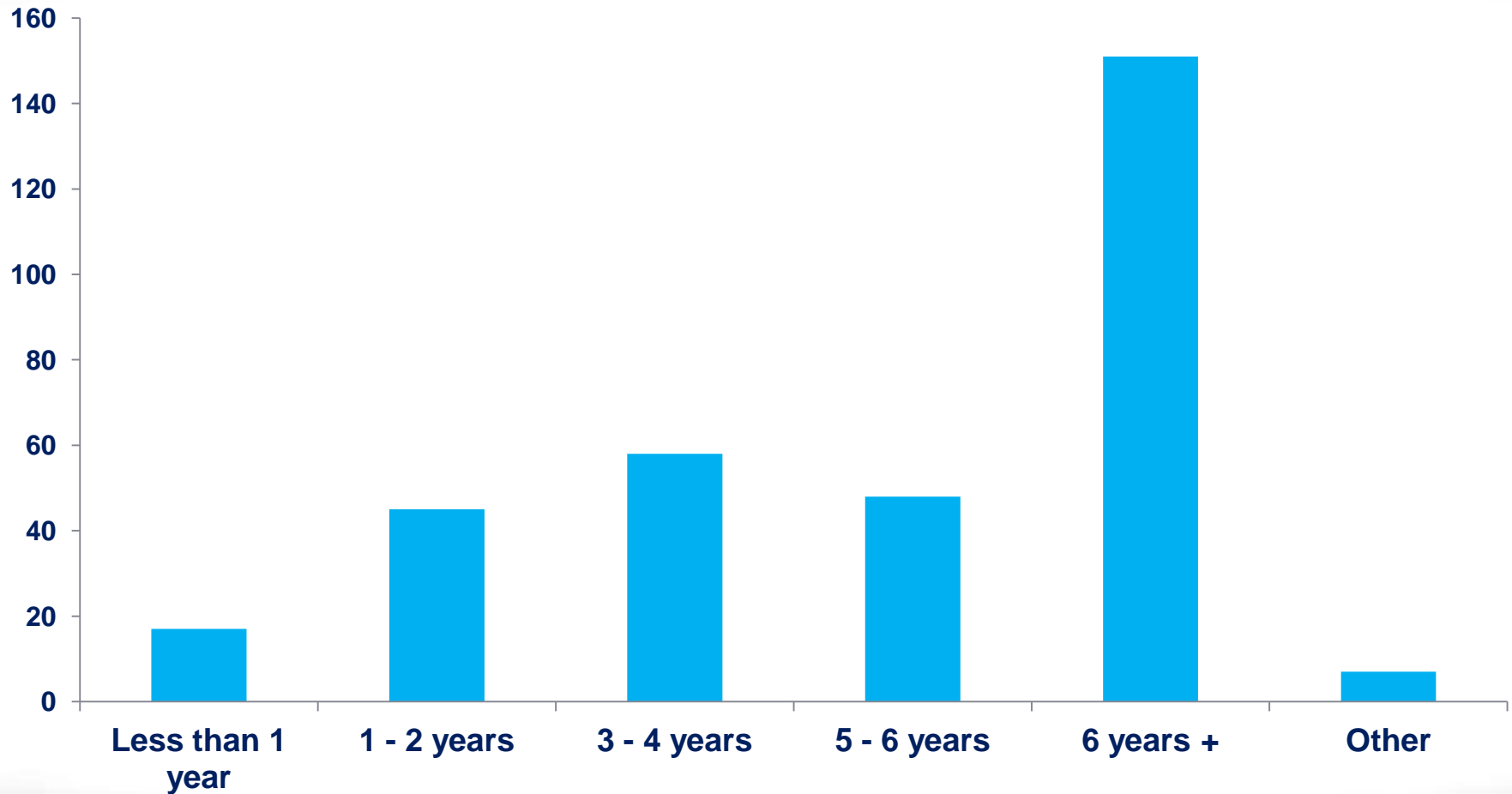
Market Adoption: Do you currently utilize a RIS? (200-400 beds)



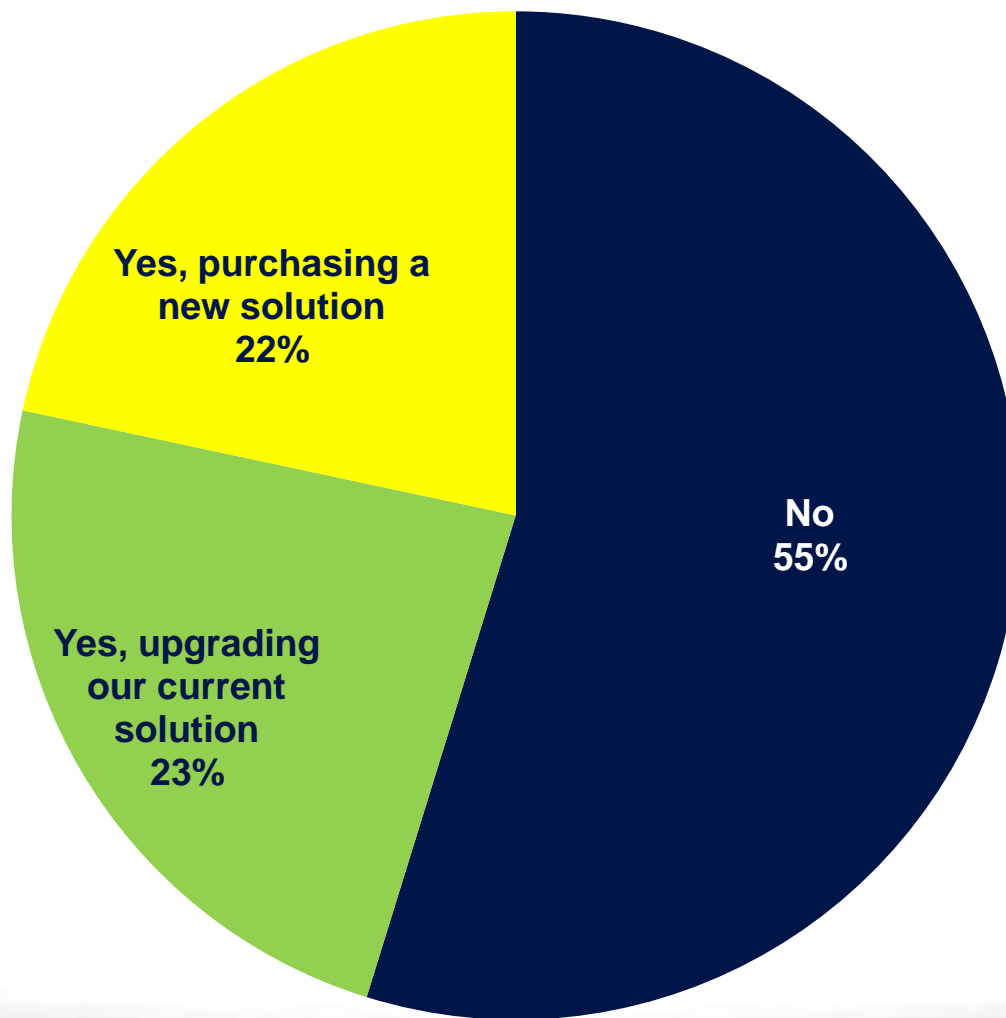


Market Opportunity

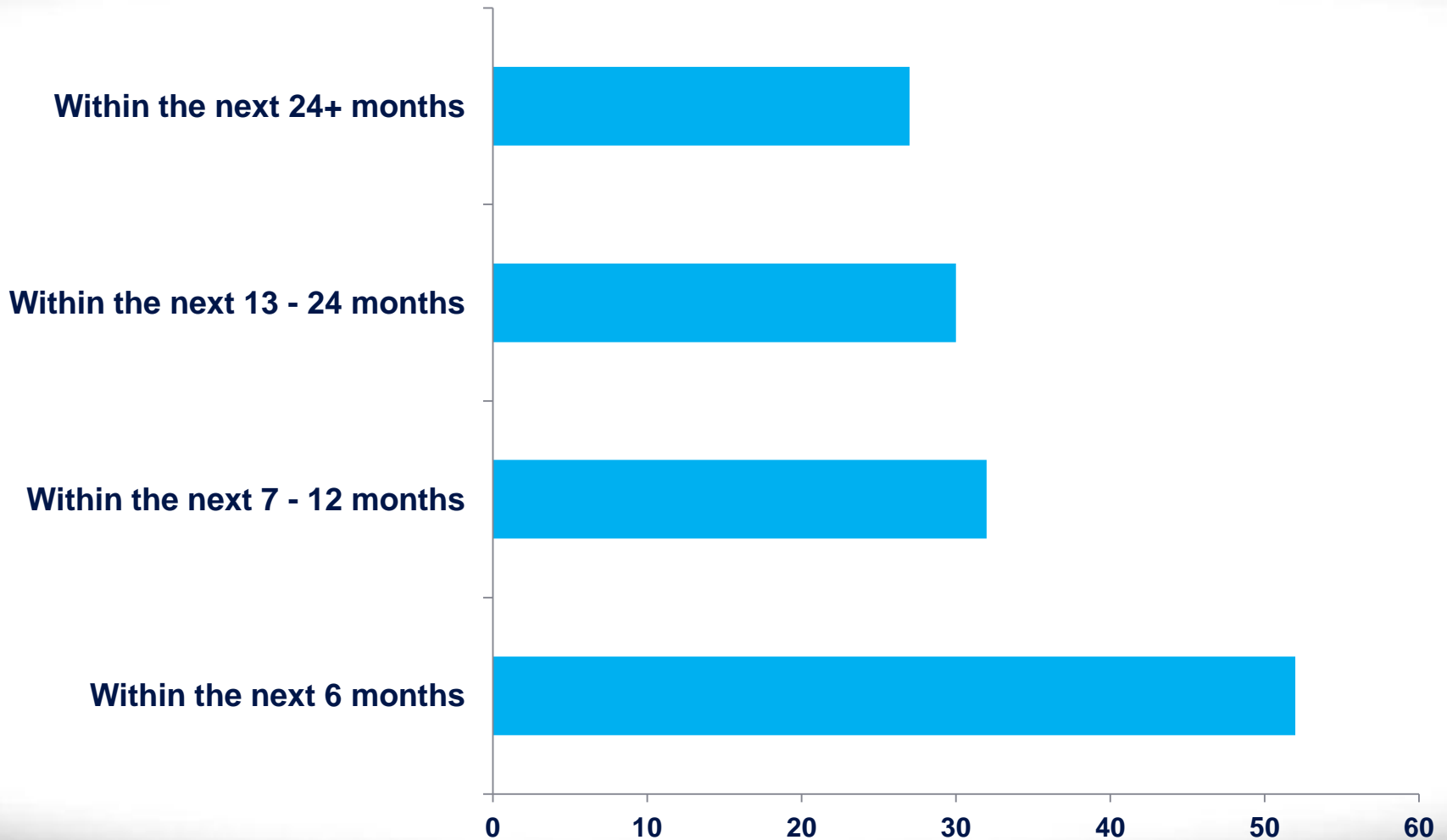
Market Opportunity: How old is your current RIS?



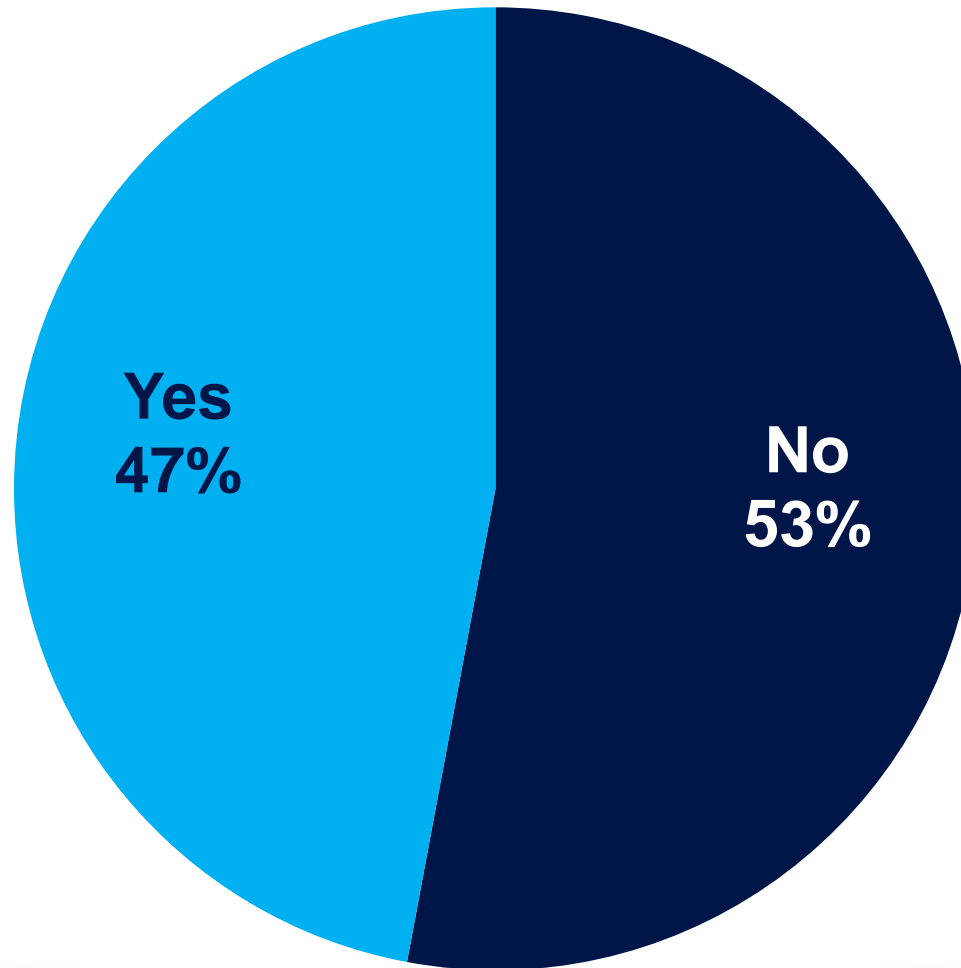
Market Opportunity: Do you plan on purchasing a new or upgrading your current RIS?



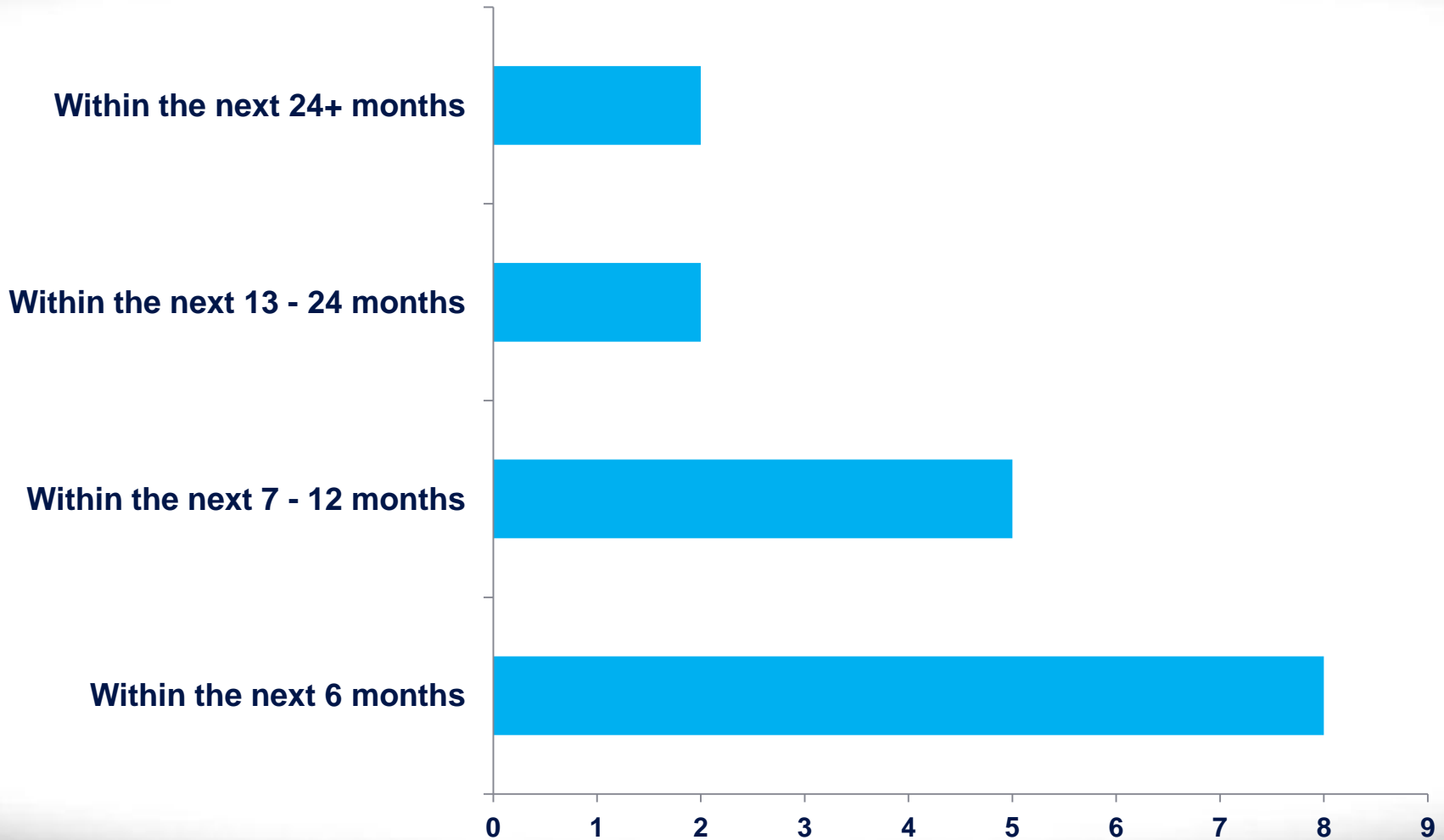
What time frame?



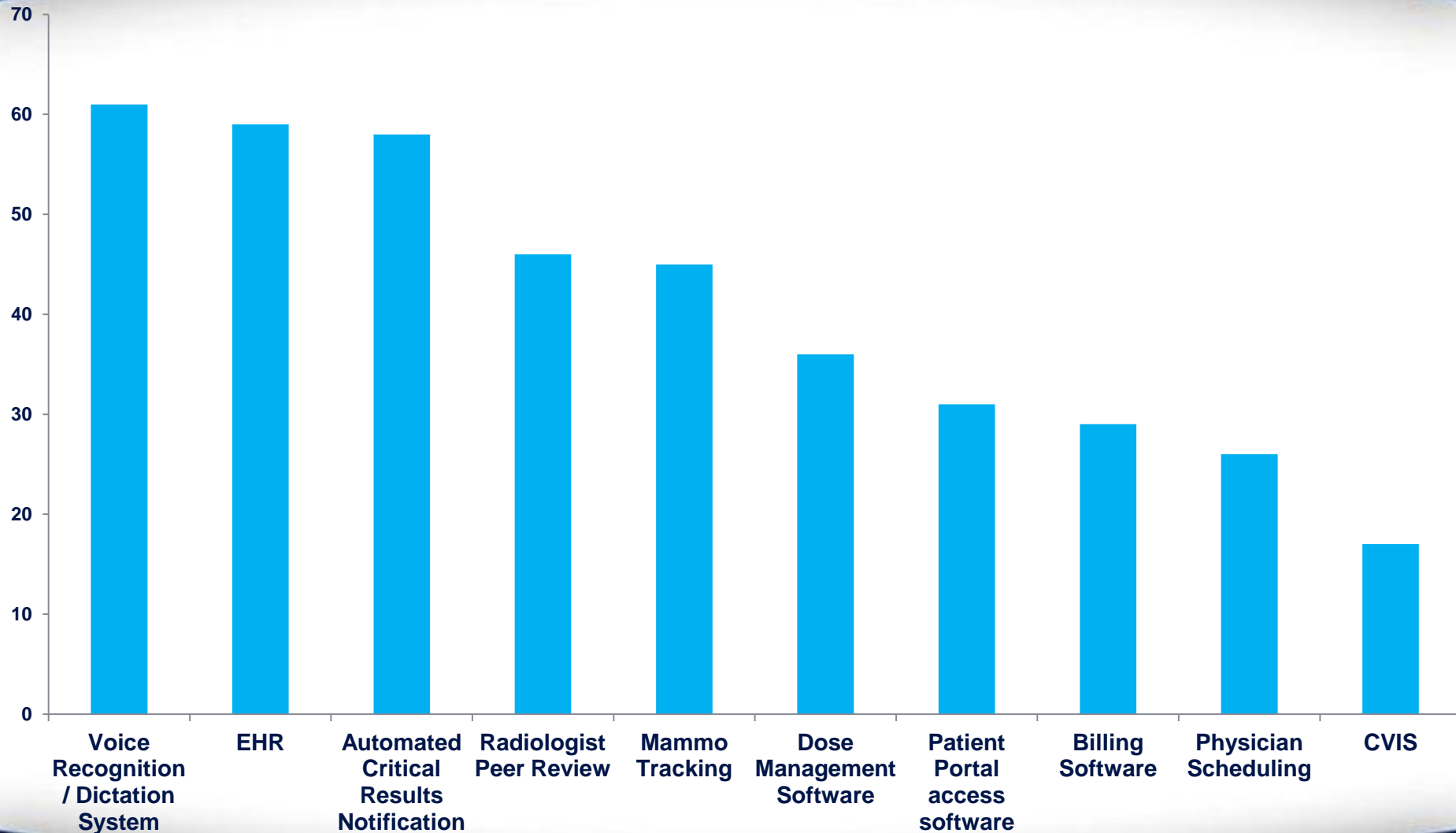
Do you have plans to purchase a RIS solution? (For those who do not already have a RIS)



What time frame? (For those who do not already have a RIS)



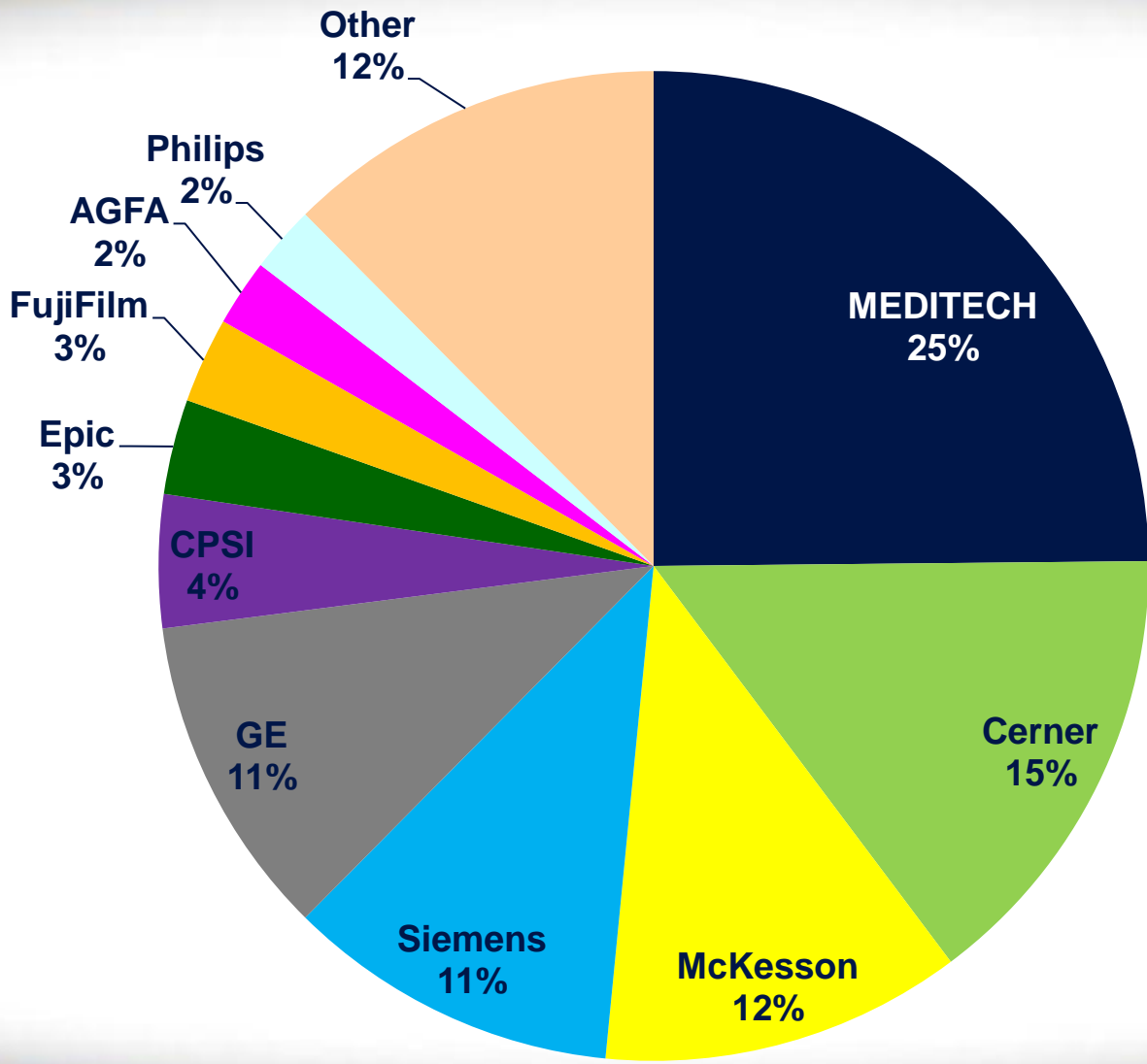
Market Opportunity: Which of the following systems do you plan to purchase or replace within the next 24 months?



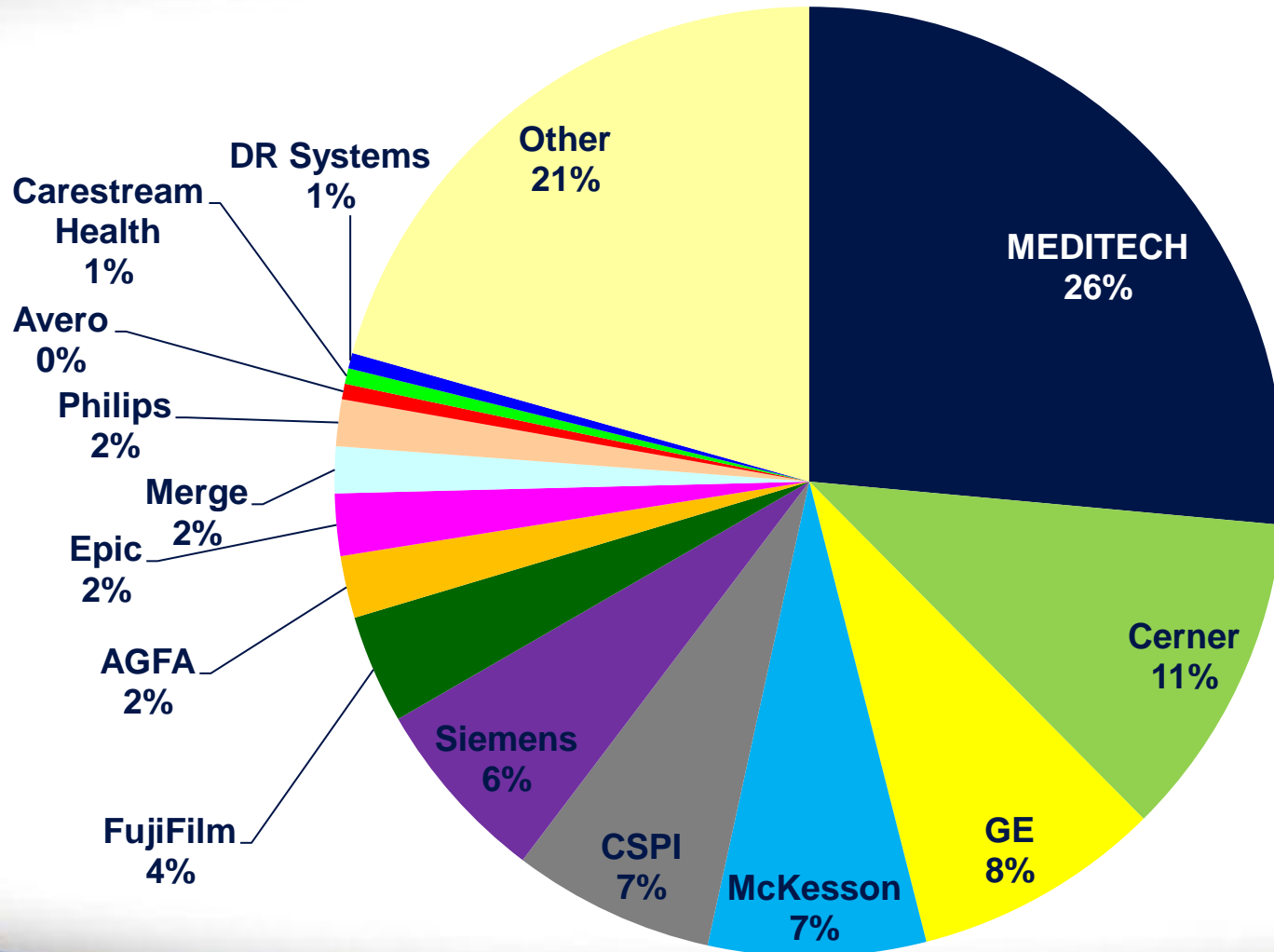


Vendor Market Share

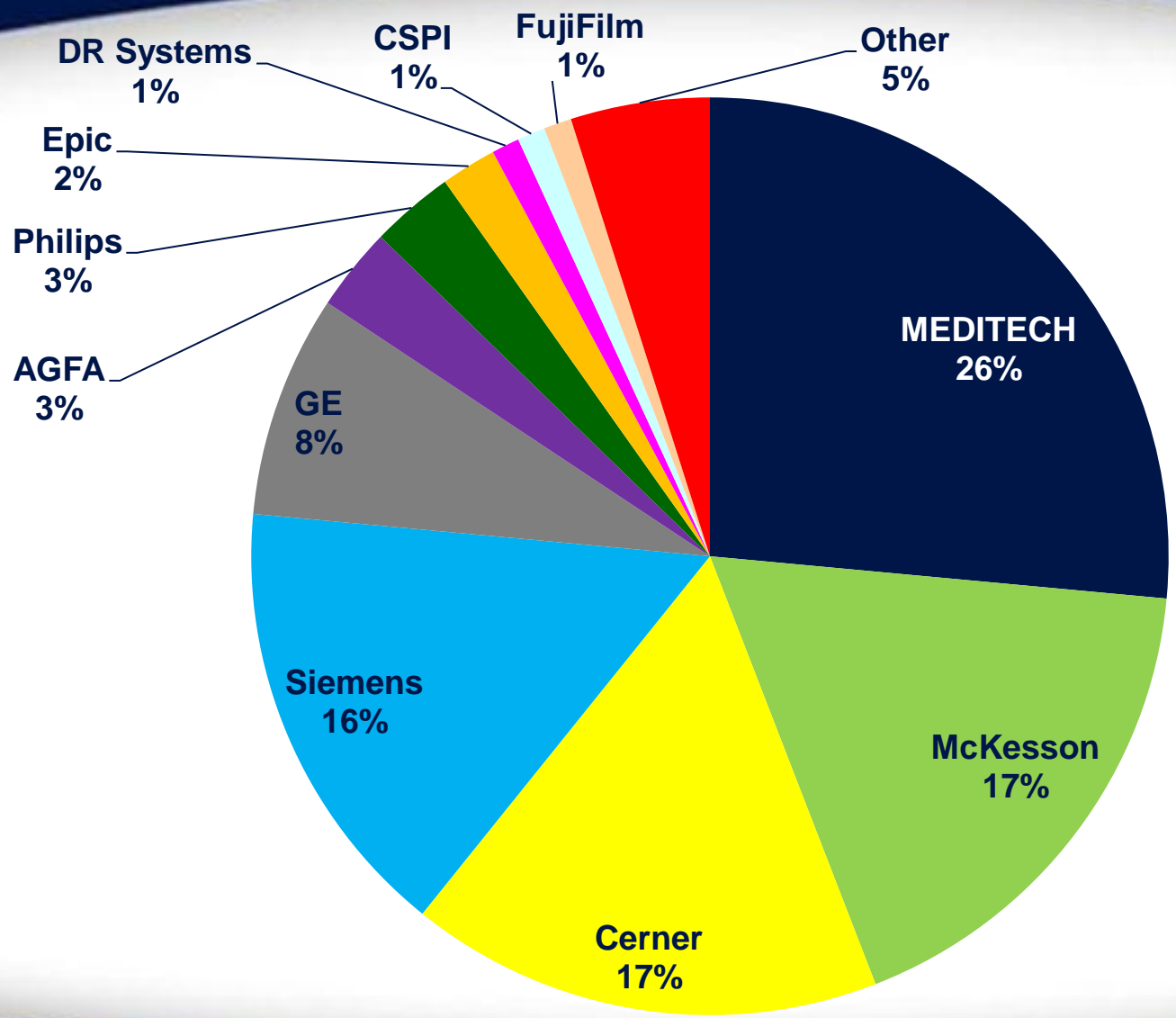
Market Share: Who is your primary RIS vendor?



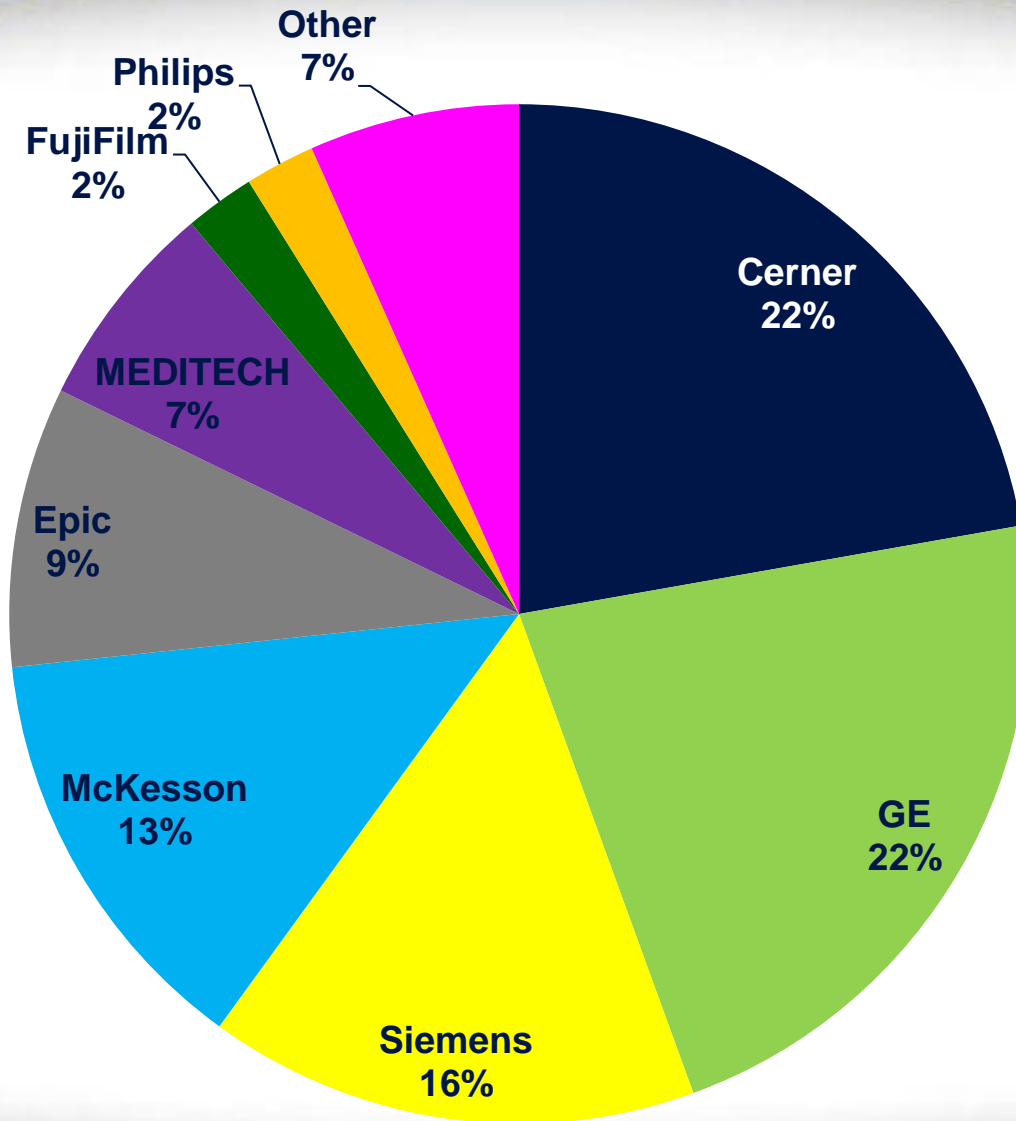
Market Share: Who is your primary RIS vendor? (>200 beds)



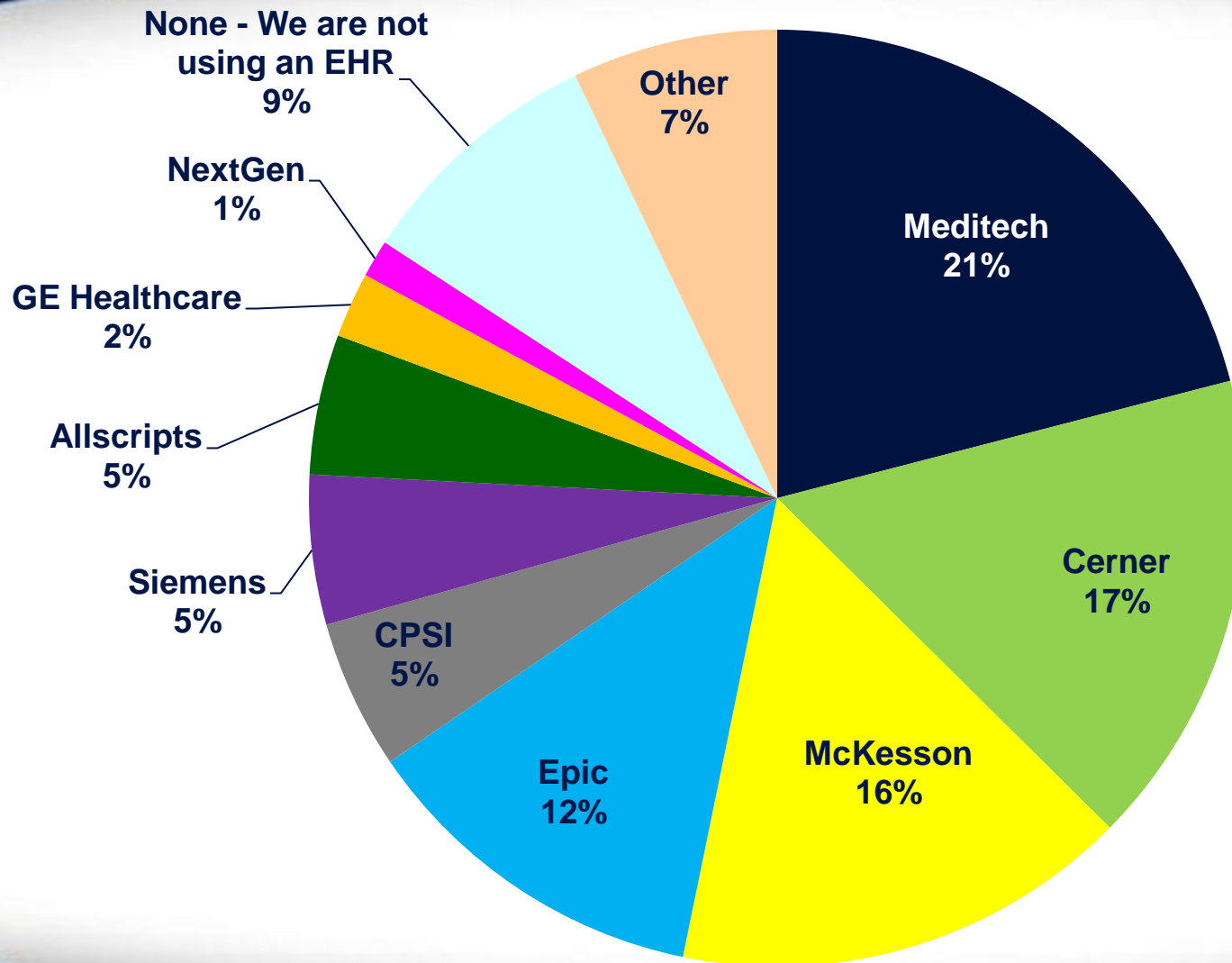
Market Share: Who is your primary RIS vendor? (200-400 beds)



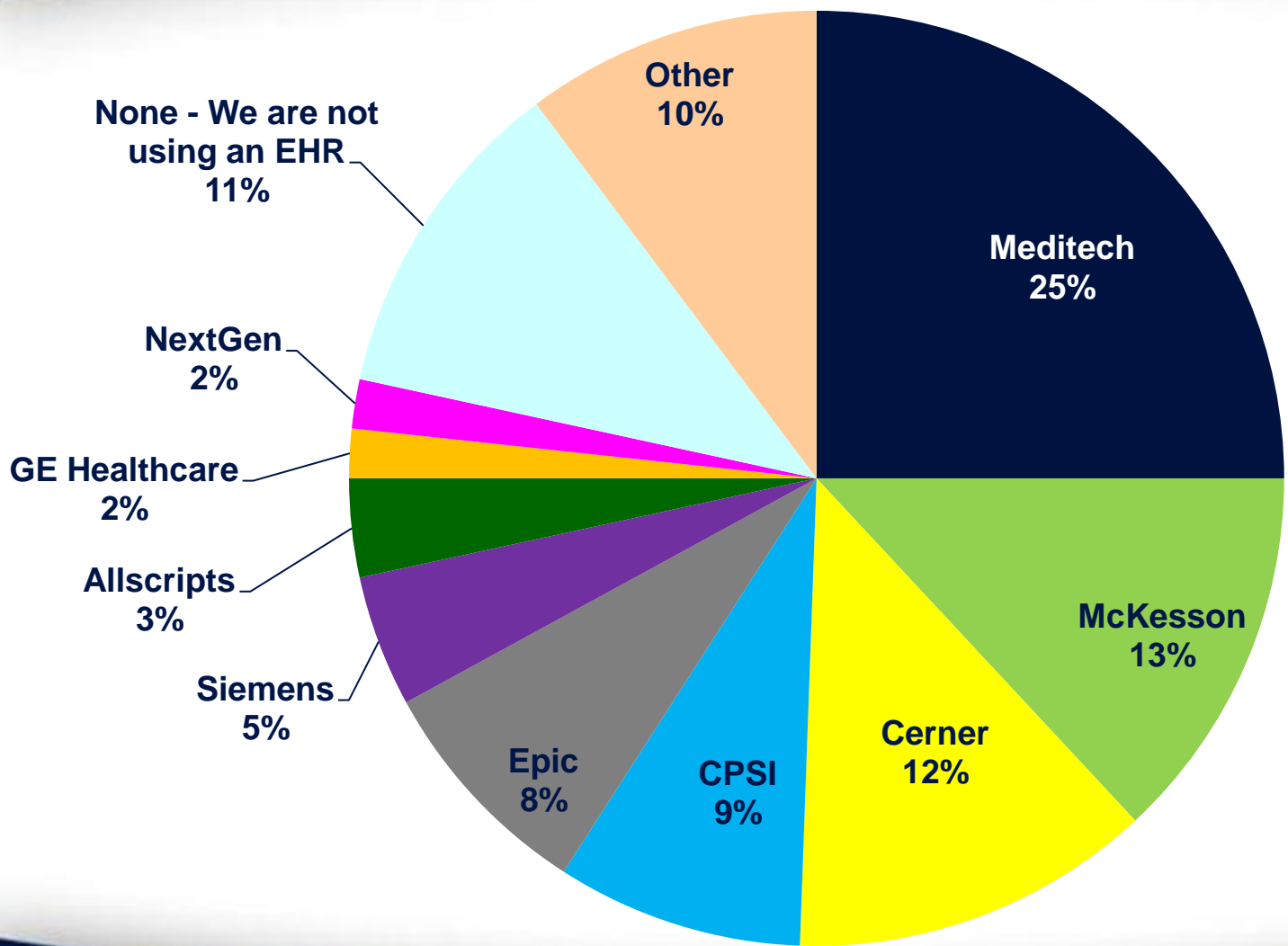
Market Share: Who is your primary RIS vendor? (>400 beds)



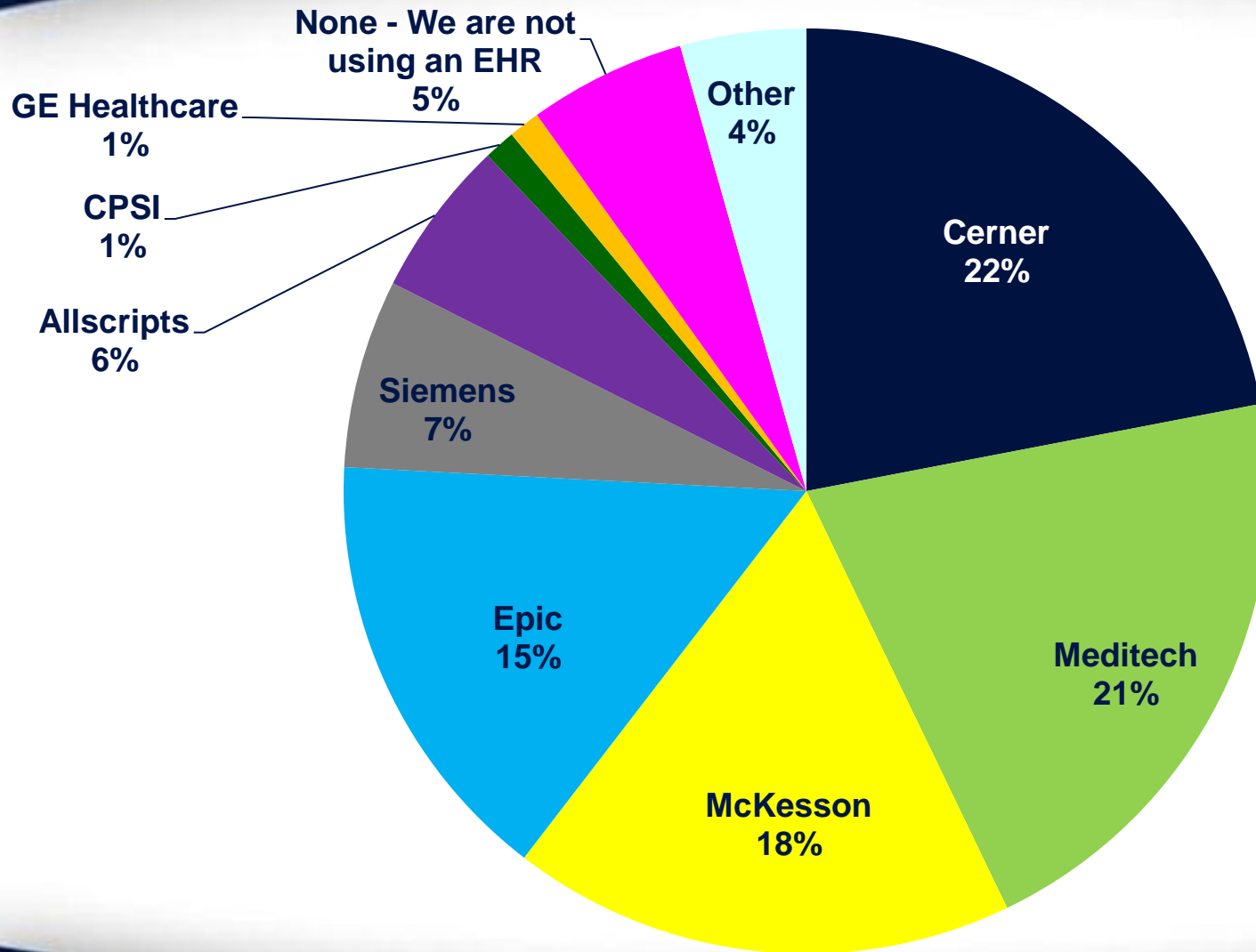
Market Share: Who is your primary inpatient EHR vendor?



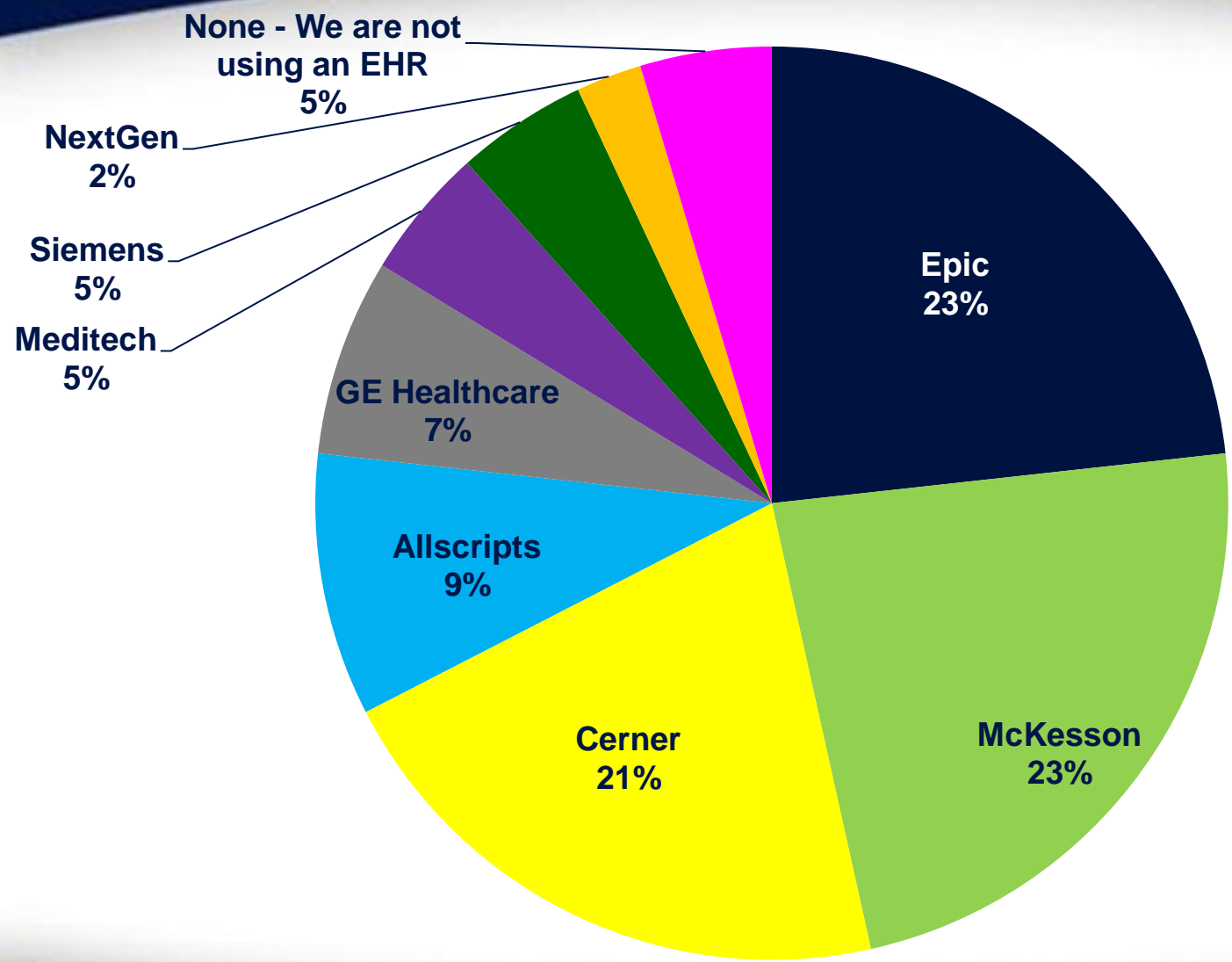
Market Share: Who is your primary inpatient EHR vendor? (<200 beds)



Market Share: Who is your primary inpatient EHR vendor? (200-400 beds)



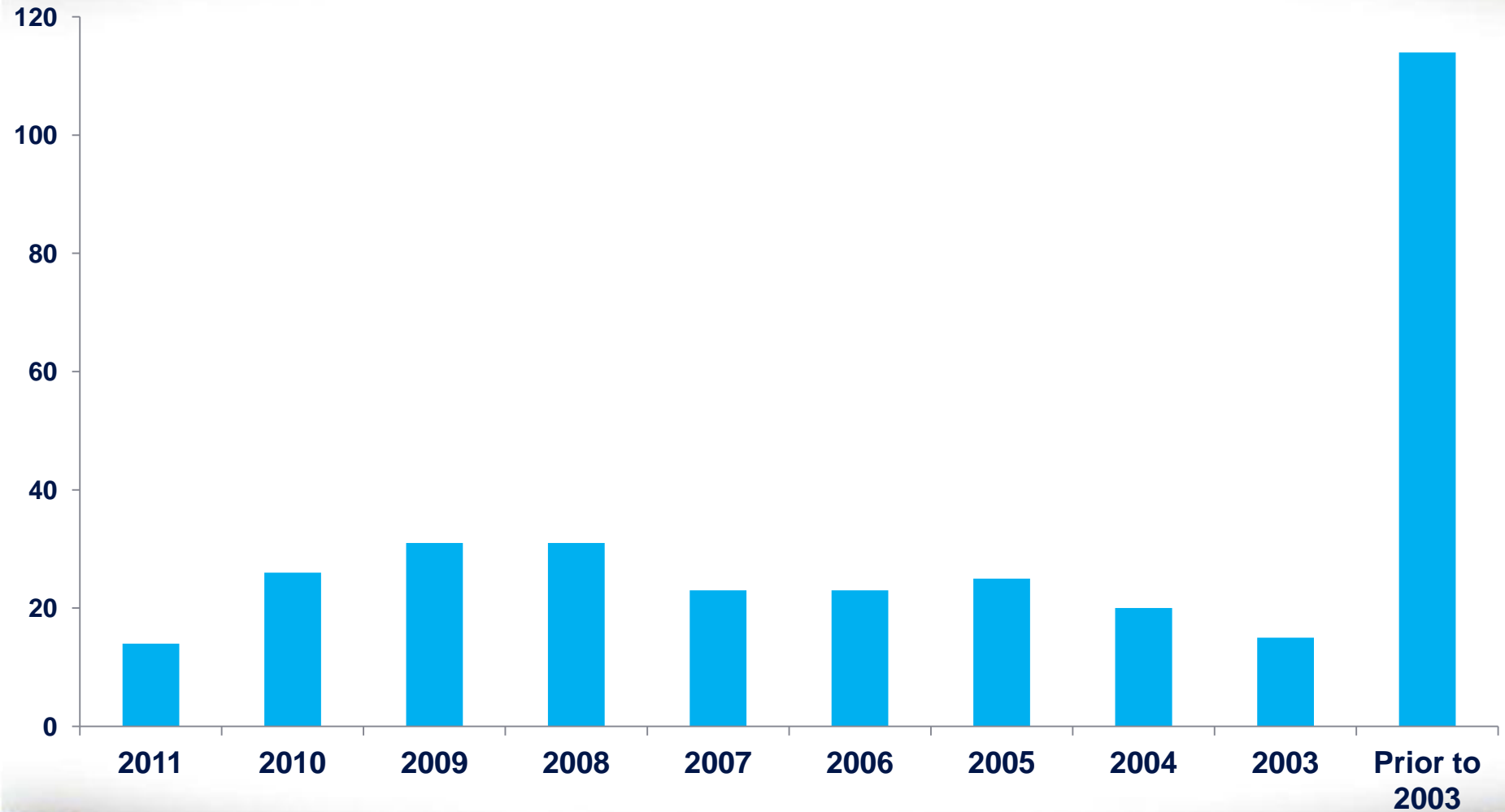
Market Share: Who is your primary inpatient EHR vendor? (>400 beds)



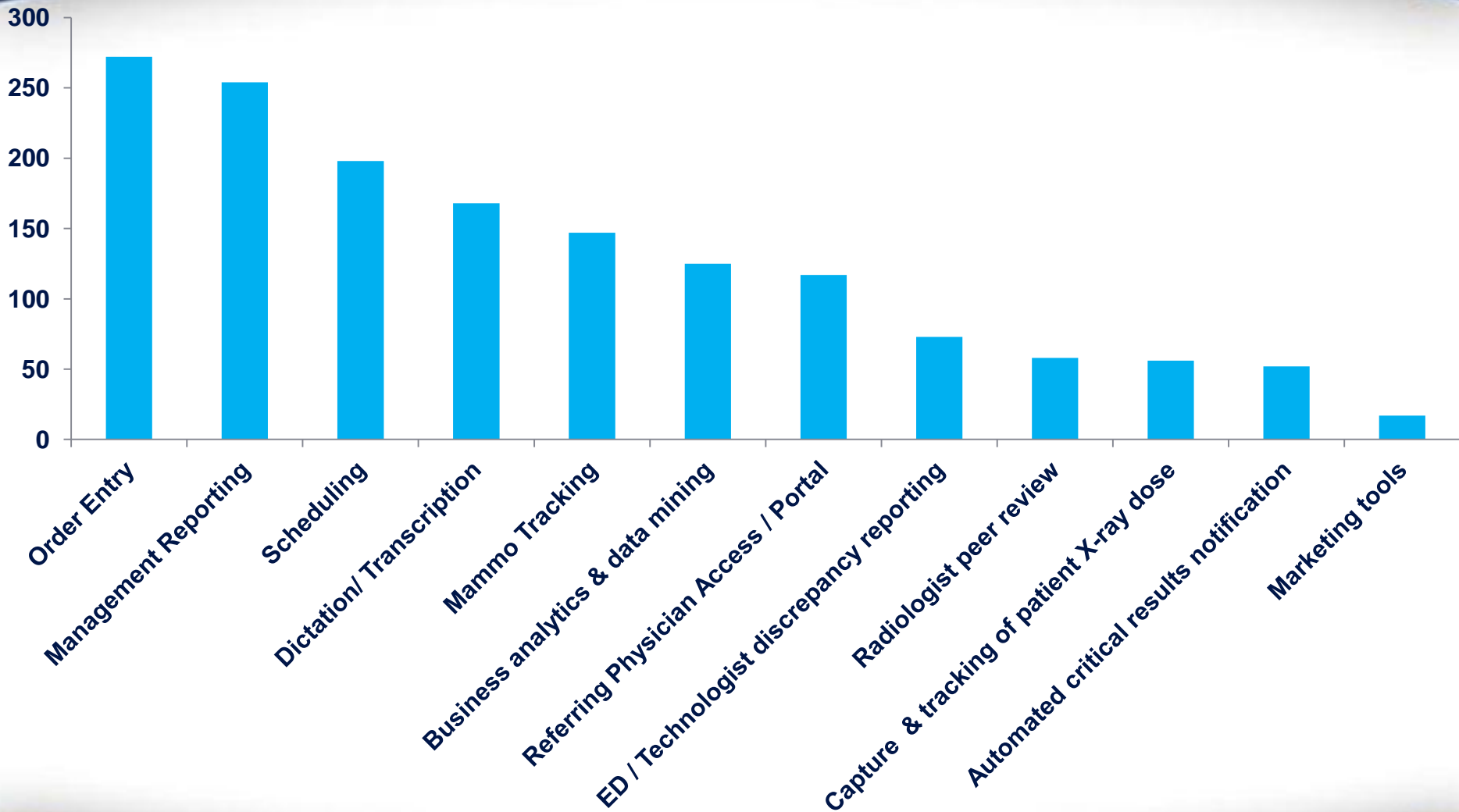


Voice of Customer (VOC)

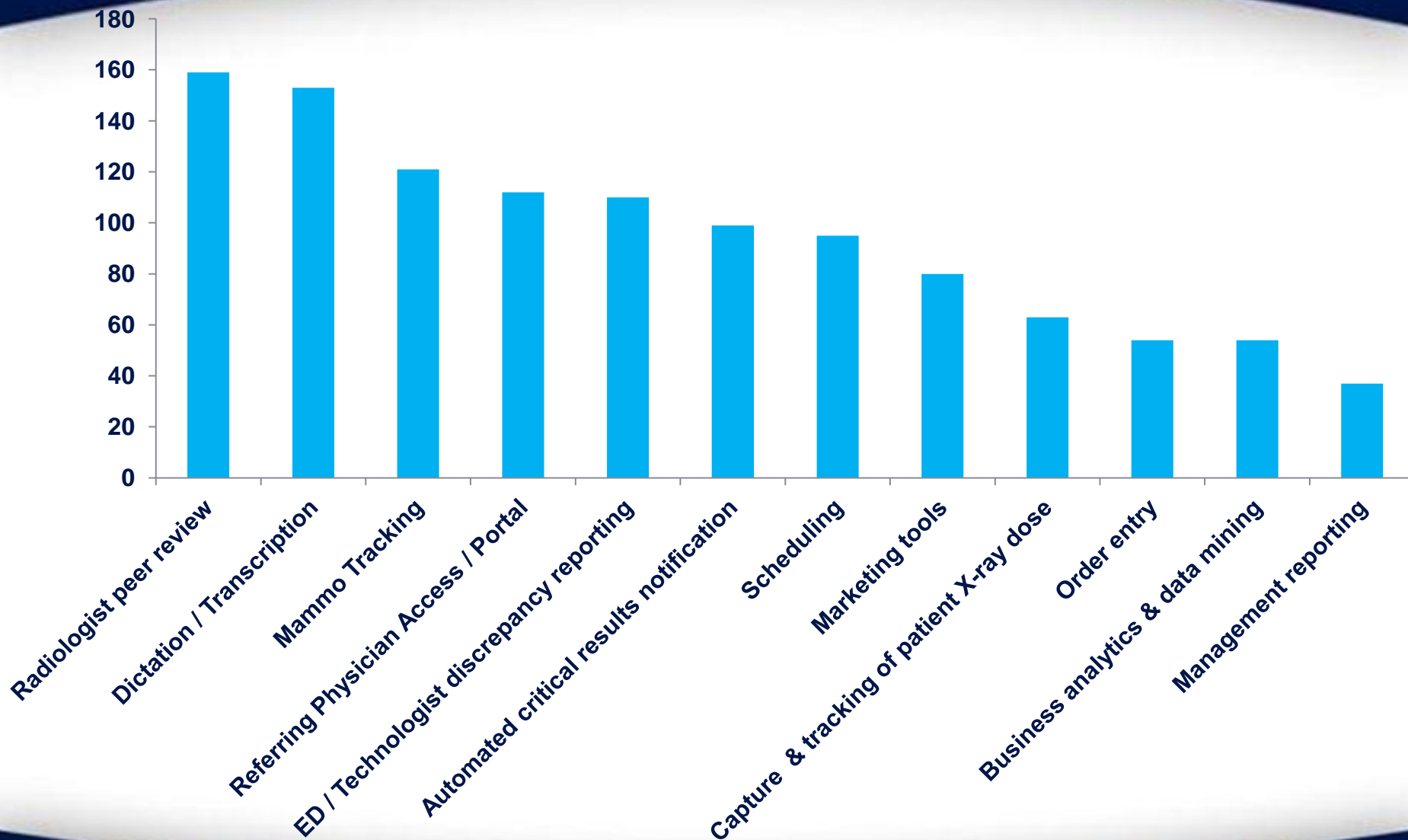
VOC: What year did you start utilizing your current RIS solution?



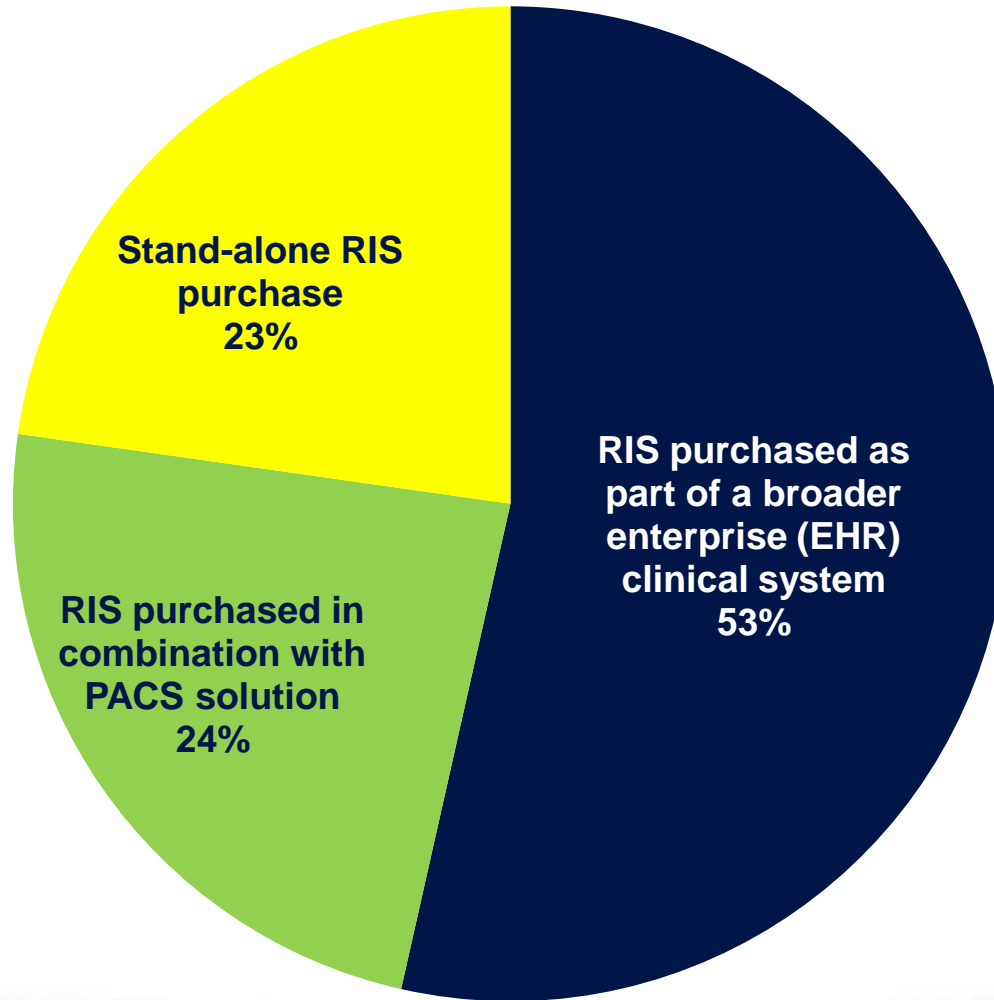
VOC: Which of the following functions do you use your RIS for?



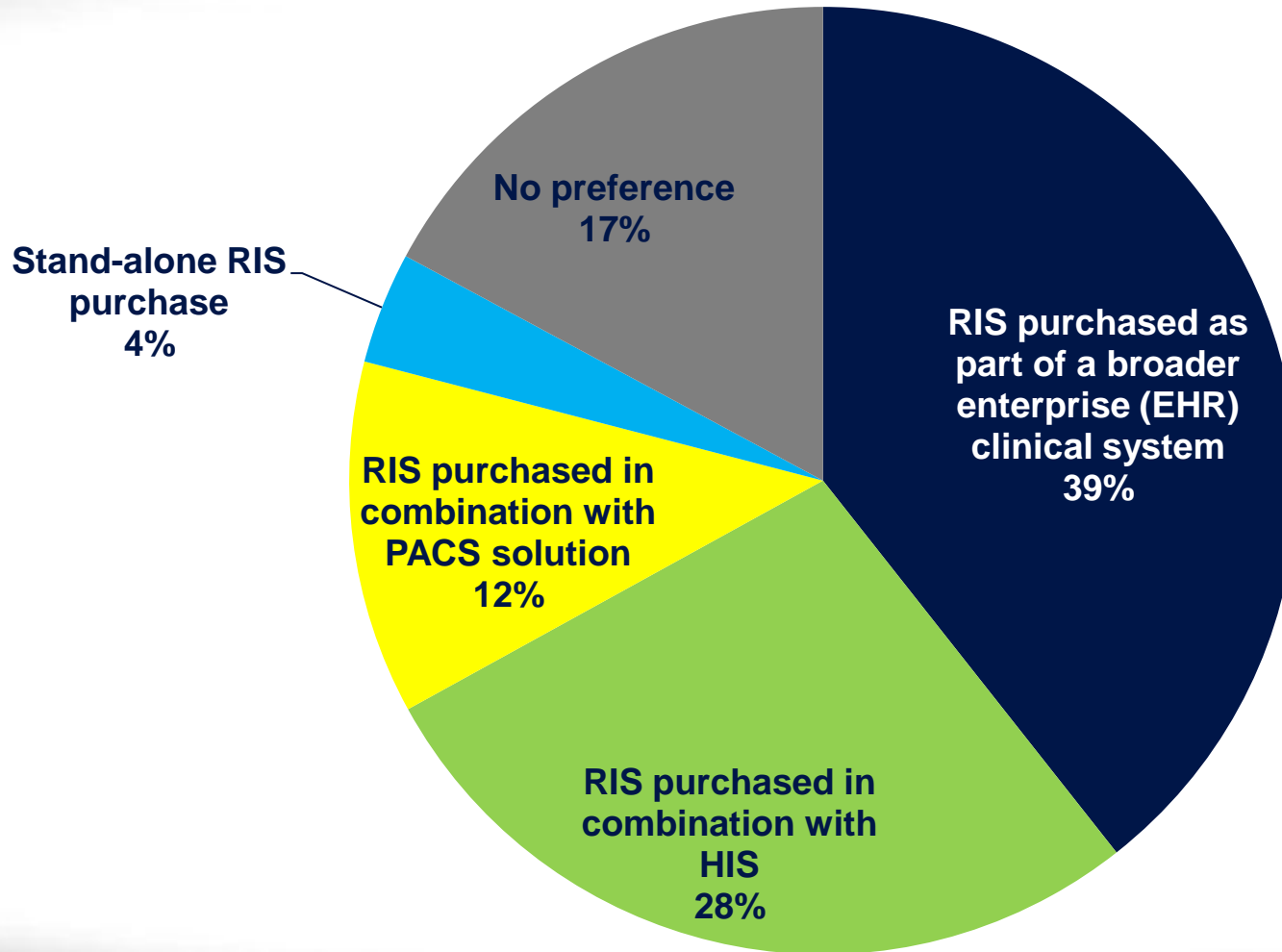
VOC: Which of the following functions do you use a vendor **other than your RIS** to provide?



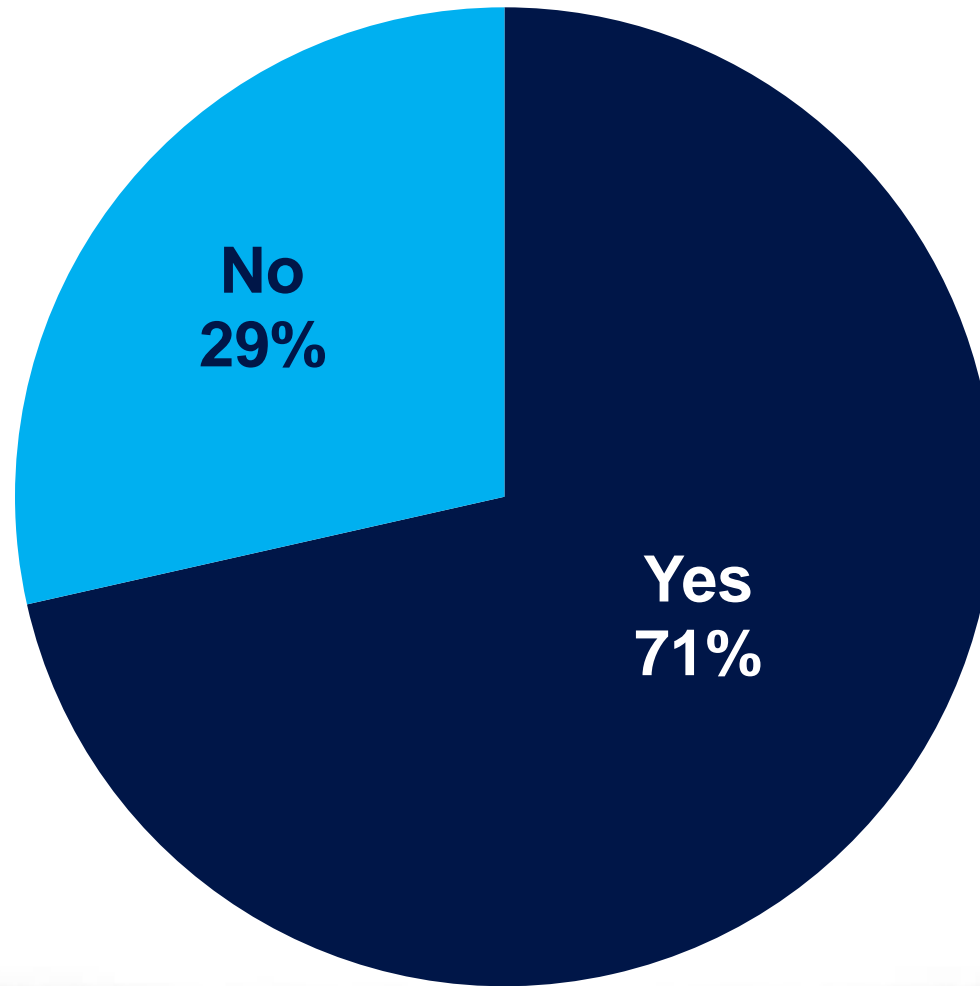
VOC: Which of the following best describes your recent RIS purchase?



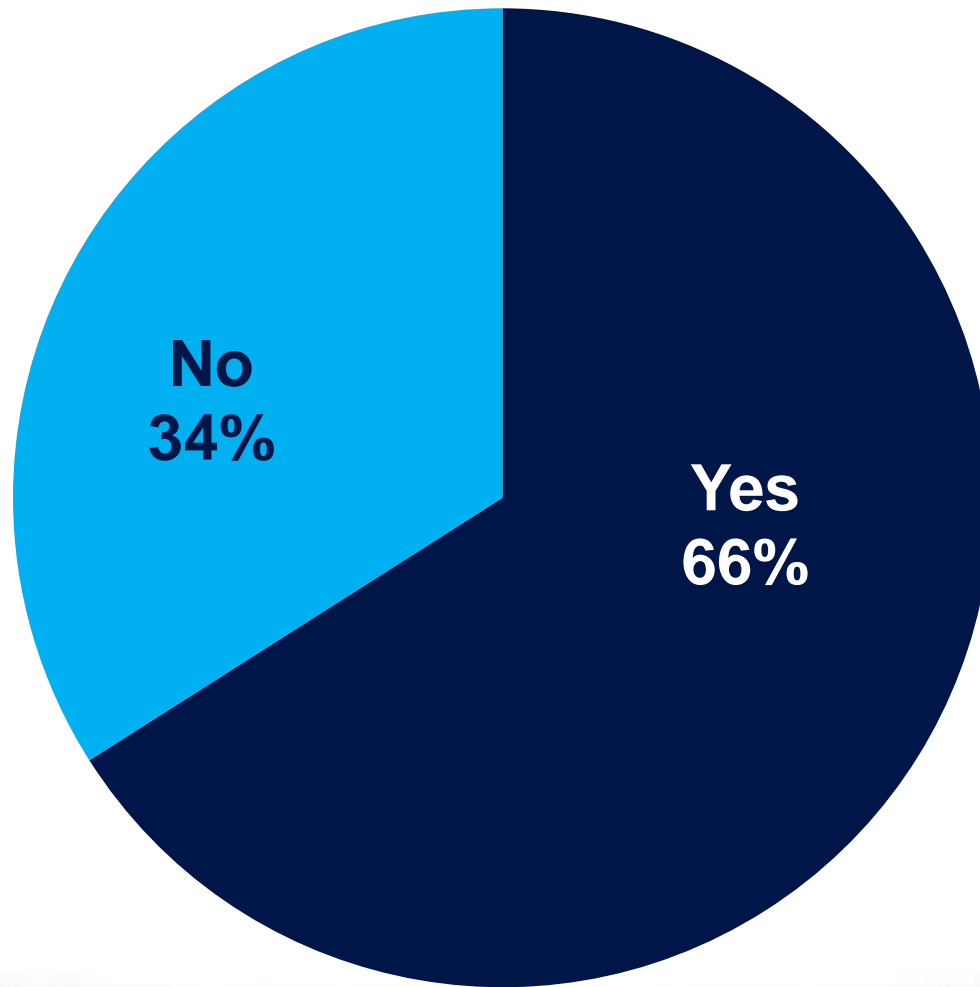
VOC: Which of the following approaches would you prefer when purchasing a RIS?



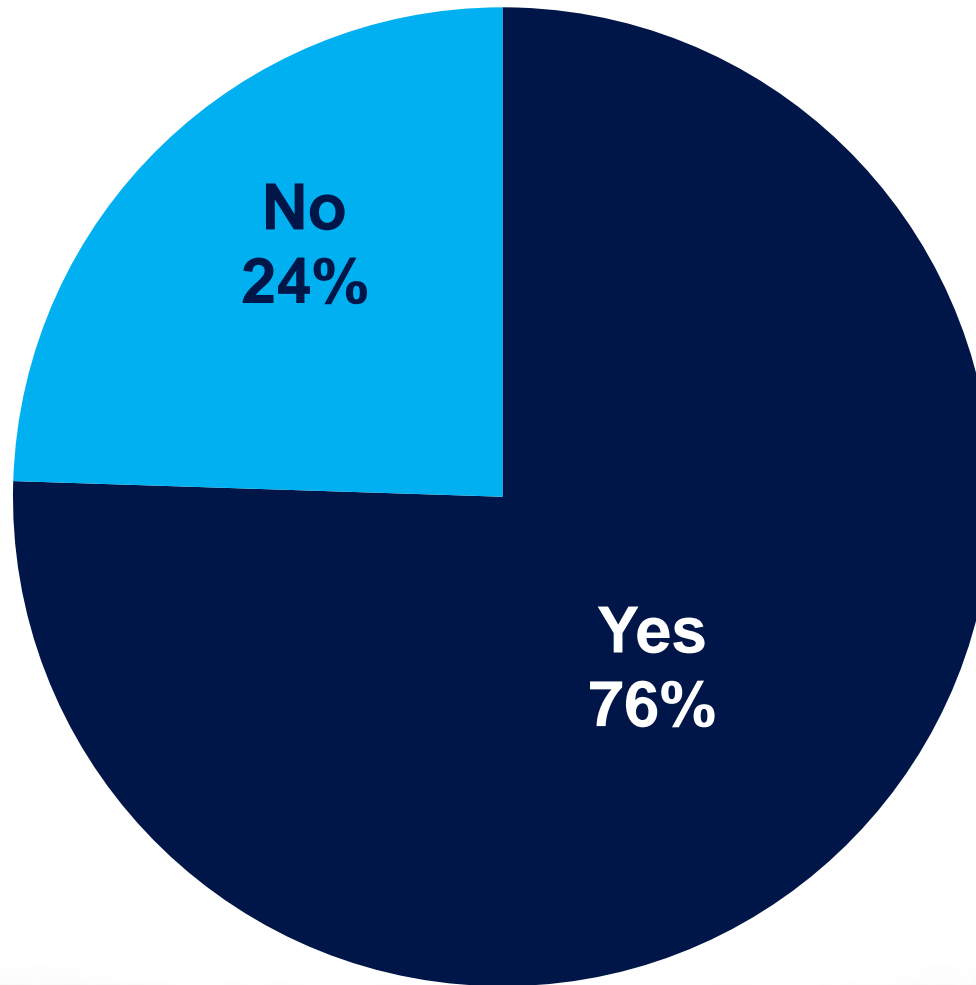
VOC: Are you aware that Meaningful Use (MU) incentive payments now apply to radiologists as eligible physicians under the HITECH?



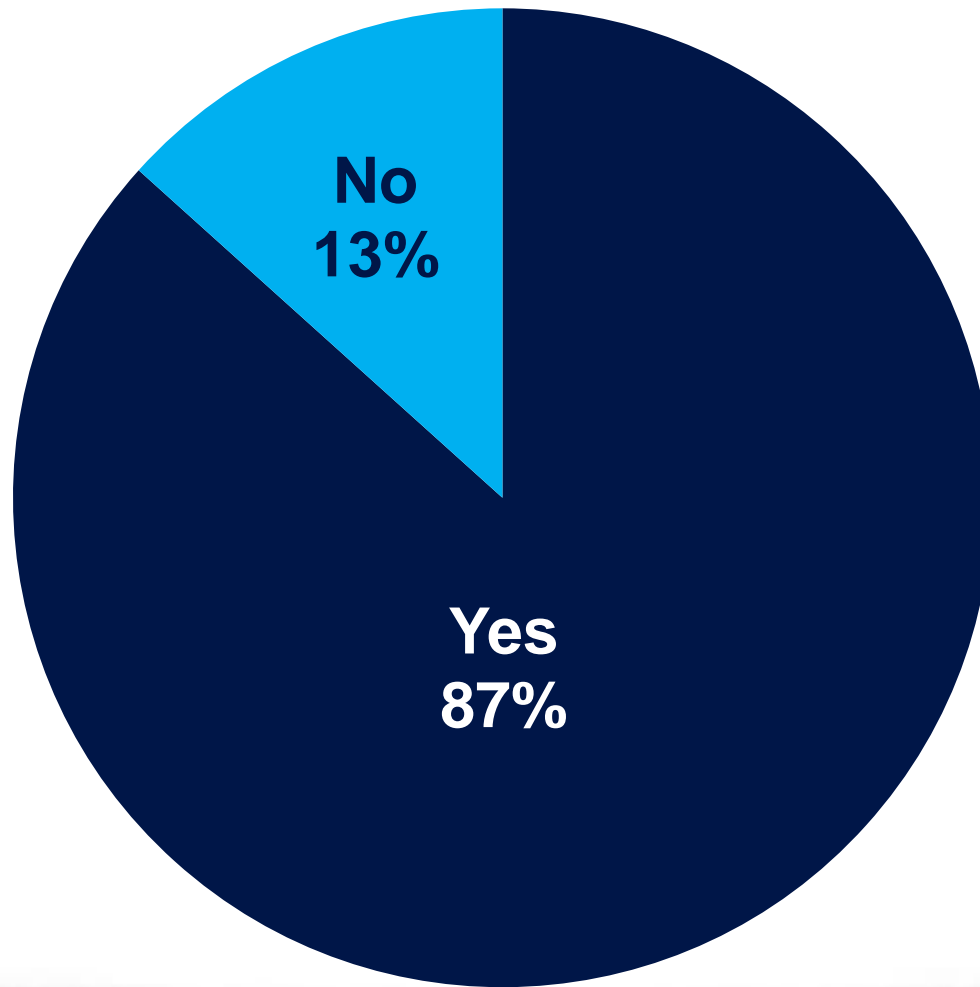
VOC: Are you aware that Meaningful Use (MU) incentive payments now apply to radiologists as eligible physicians under the HITECH? (<200 beds)



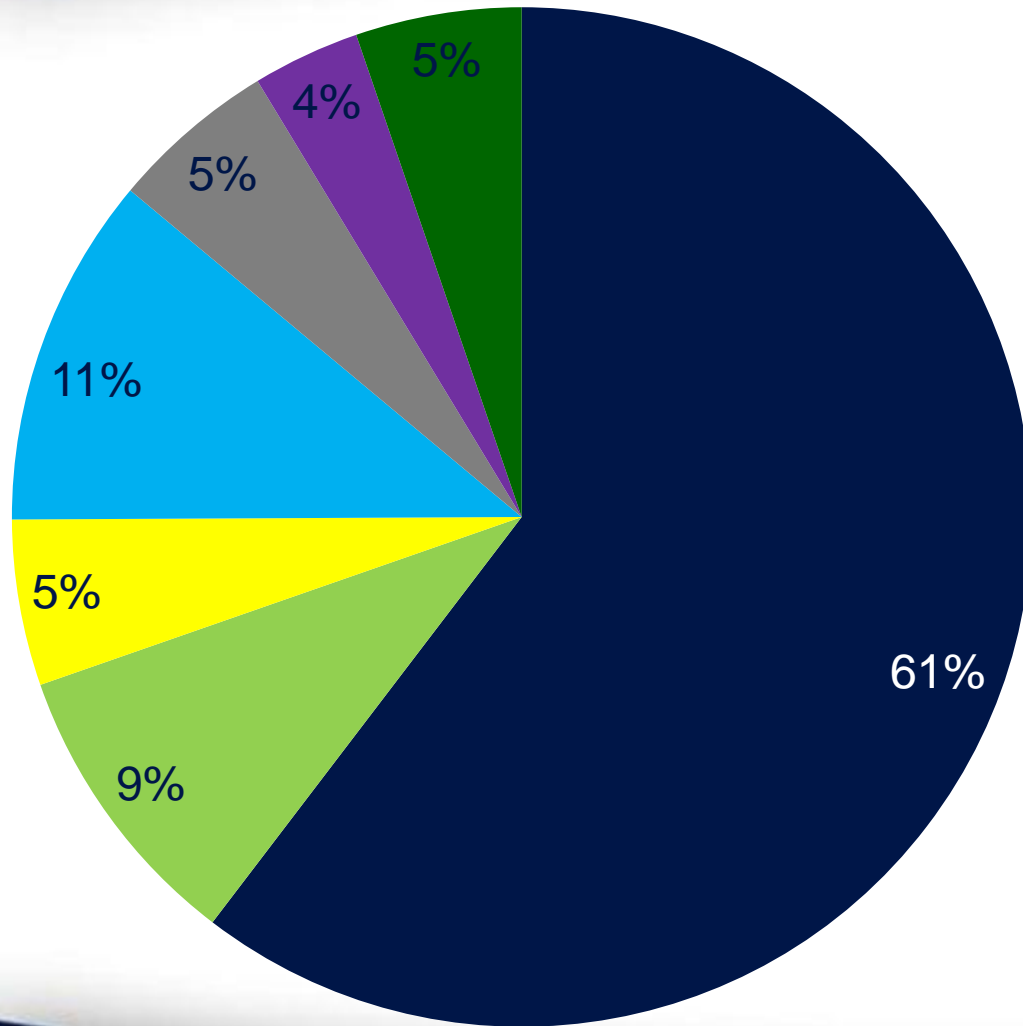
VOC: Are you aware that Meaningful Use (MU) incentive payments now apply to radiologists as eligible physicians under the HITECH? (200-400 beds)



VOC: Are you aware that Meaningful Use (MU) incentive payments now apply to radiologists as eligible physicians under the HITECH? (>400 beds)

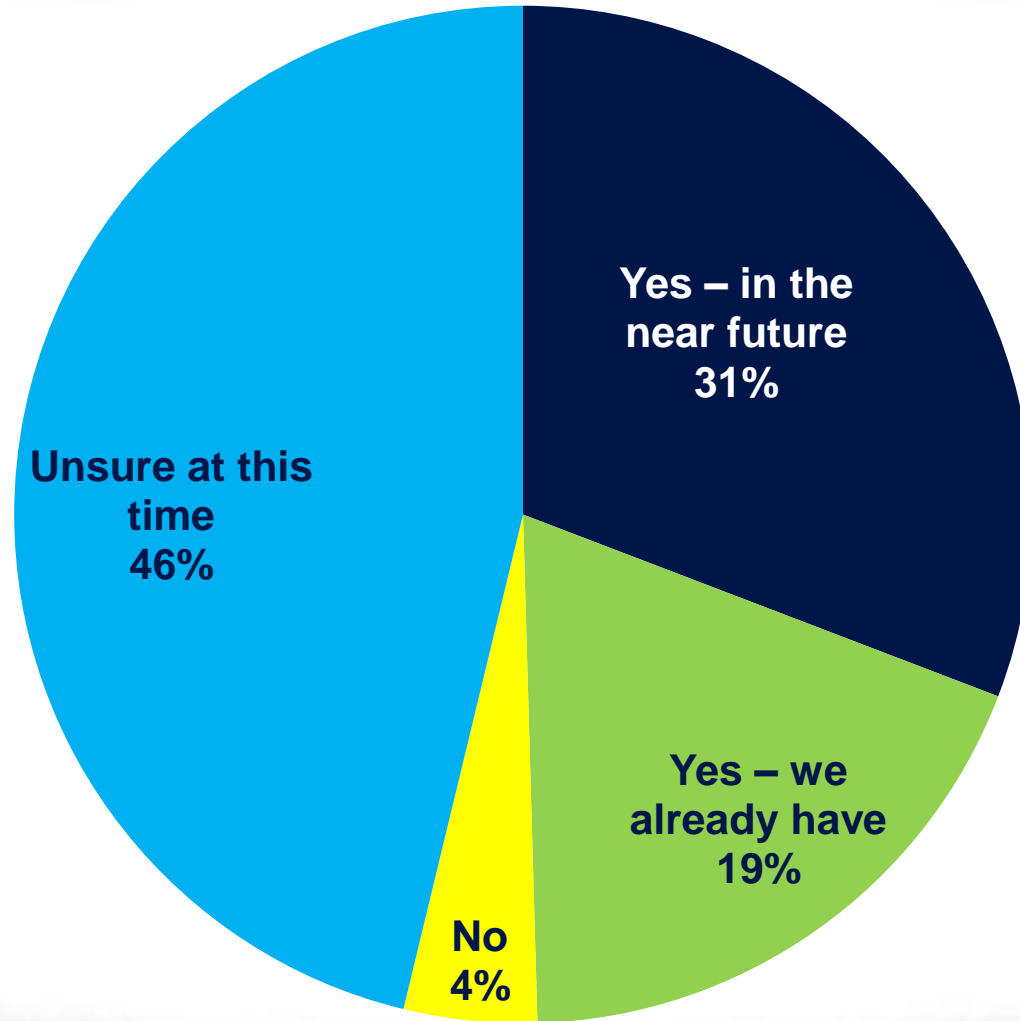


VOC: Which of the following best describes your facility's/organization's strategy to achieve and document MU with your RIS/PACS?

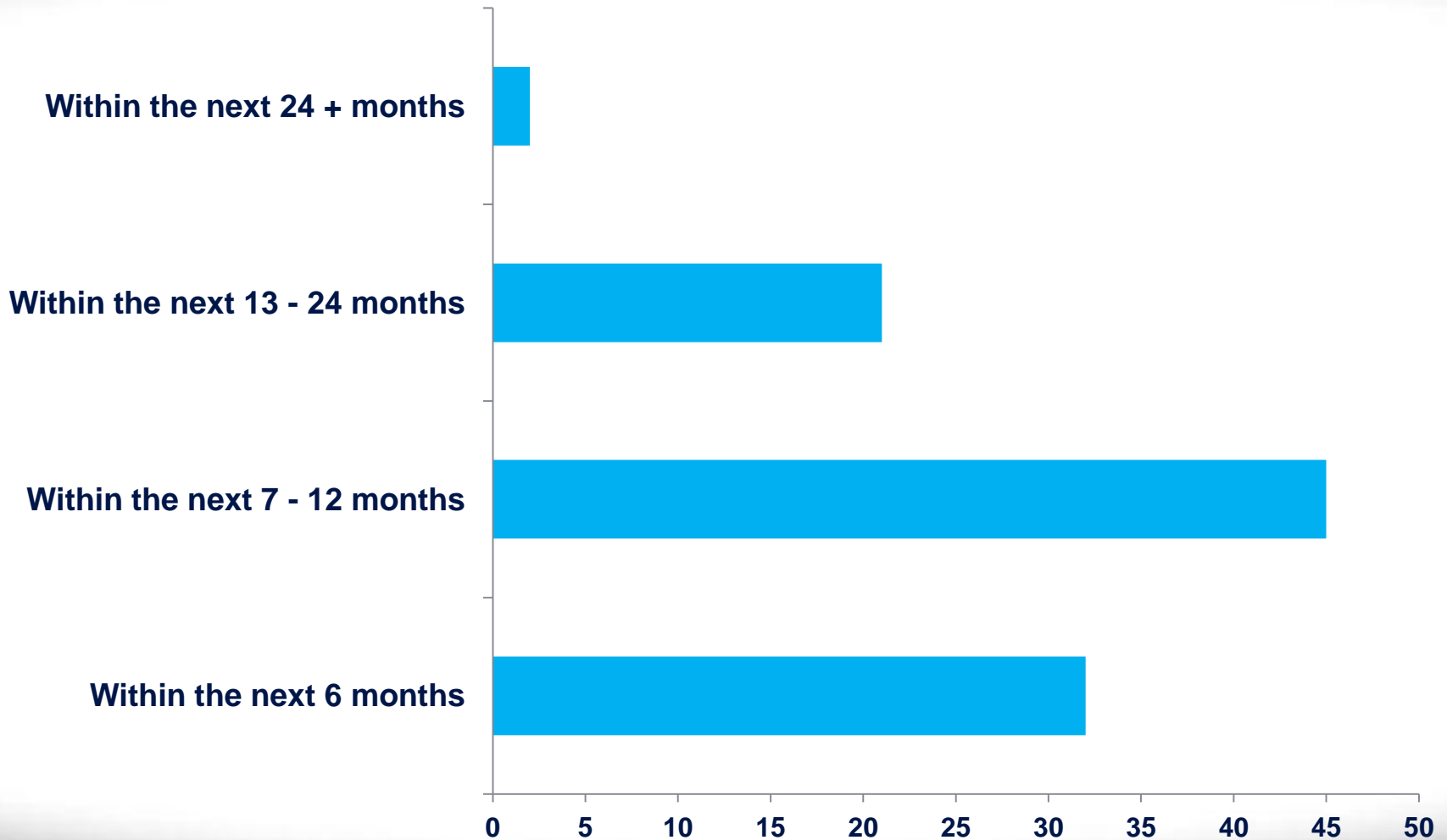


- We are working with our current RIS/PACS vendor to optimize the use of our current RIS/PACS solution
- We are in the process of evaluating vendors for a new RIS/PACS solution
- We expect to initiate a search process for a new RIS/PACS solution
- We have already engaged with a consultant to assist us in optimizing the use of our current RIS/PACS solution
- We expect to engage with a consultant to assist us in optimizing the use of our current RIS/PACS solution
- We have achieved MU and have already received stimulus money from the government
- Achieving/Documenting meaningful use is not a primary concern for our organization

VOC: Will you be applying for Meaningful Use incentives?



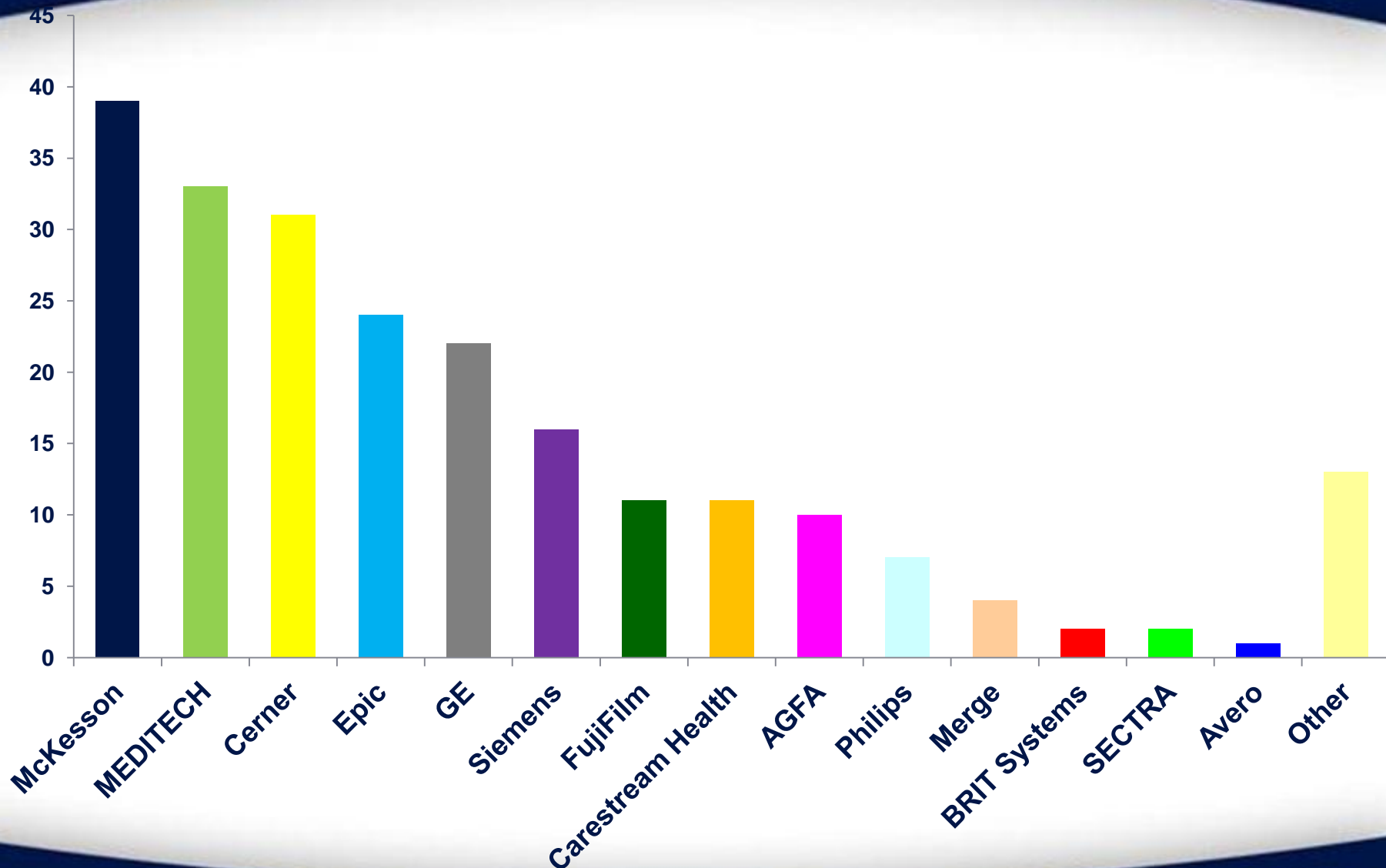
VOC: What time frame?



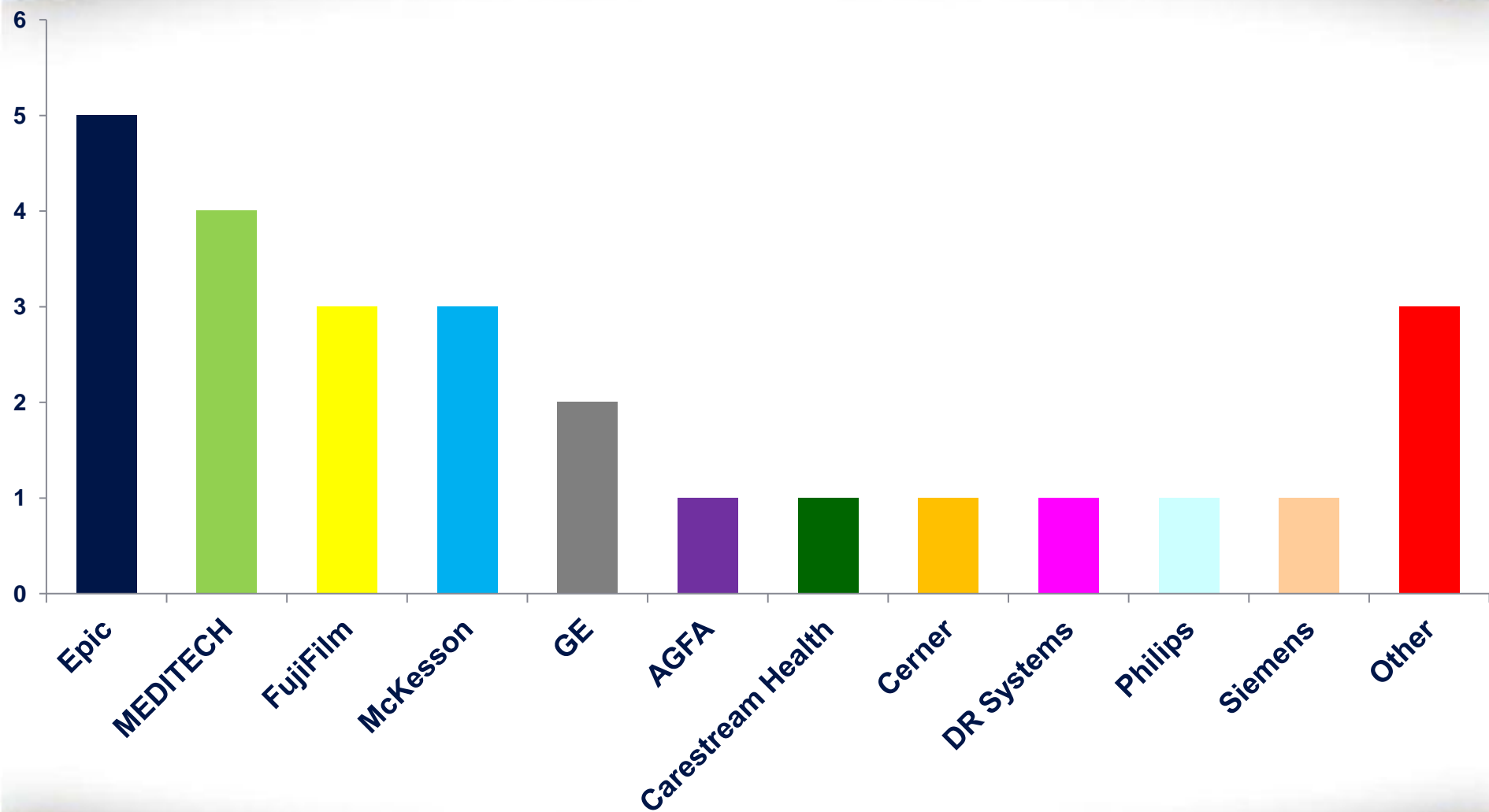


Vendor Mind Share

Mind Share: Which vendors are you considering for your RIS solution replacement or upgrade?



Mind Share: Which vendors are you considering for your RIS solution purchase? (For those who do not already have a RIS)



APPENDIX

About Us

CapSite™ is a healthcare technology research and advisory firm

Our mission is to help our healthcare vendor and provider clients make more informed strategic decisions that enable them to accelerate the growth of their business.

Research Advisory Solutions

CapSite

Voice of
Customer
(VOC)

CapSite
Database

Strategic
Industry
Reports

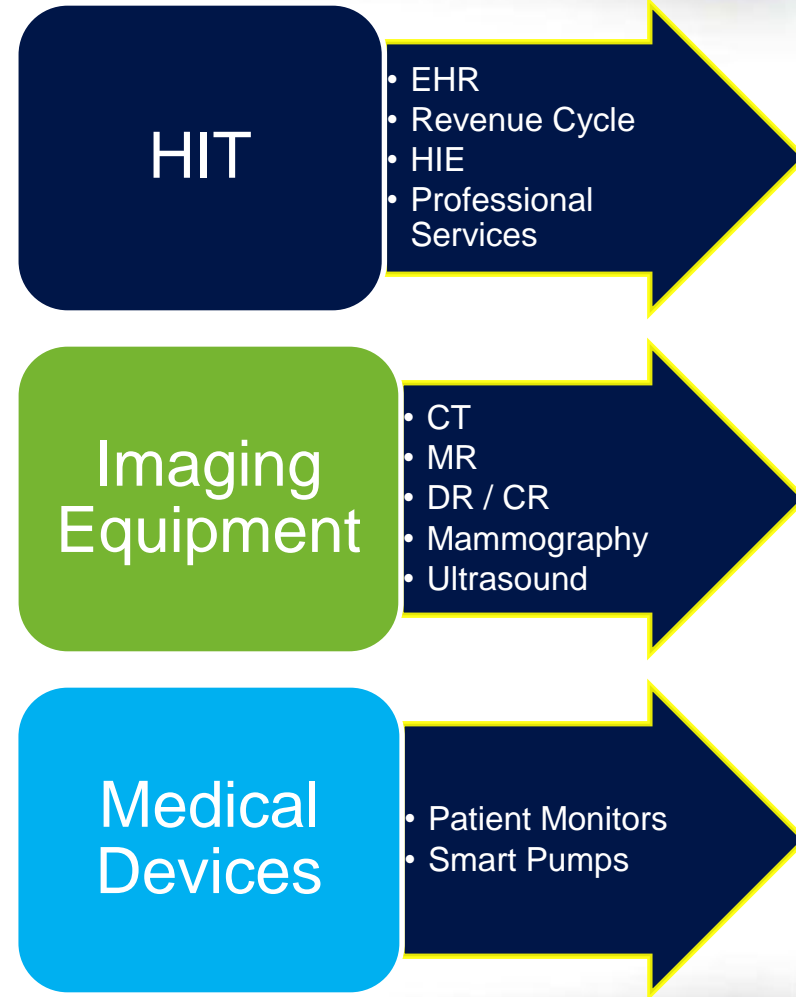
Diagnostic
Benchmarking
Win / Loss

Align your
messaging with
your customers
perception of value

Optimize your
pricing to
maximize your
revenue and profit

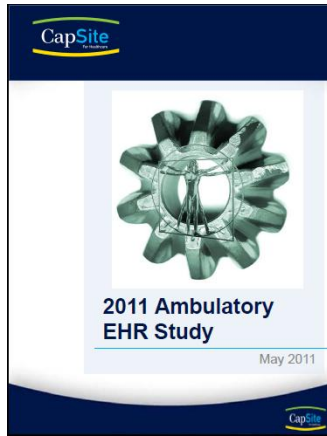
Competitive
Landscape
Market Size
Market Opportunity

Proven framework
to improve your
win rate



Strategic Industry Reports

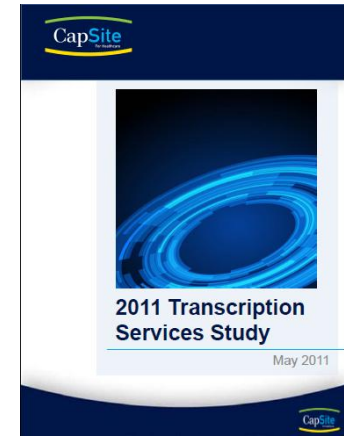
2011 Ambulatory EHR & PM



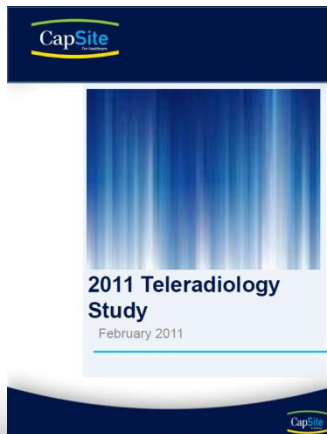
2011 Patient Access



2011 Transcription Services



2011 Teleradiology



2011 Professional Services



2011 PACS Replacement

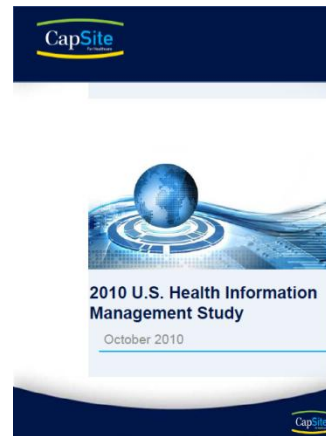


Strategic Industry Reports

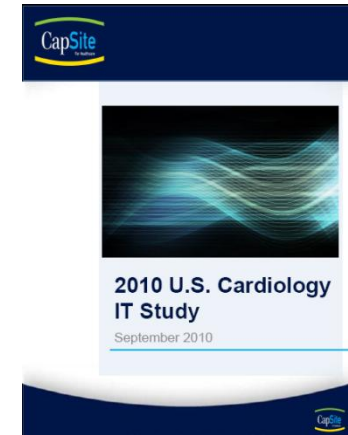
2010 Revenue Cycle Management (RCM)



2010 Health Information Management (HIM)



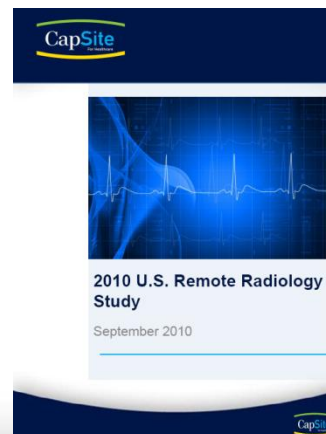
2010 Cardiology IT



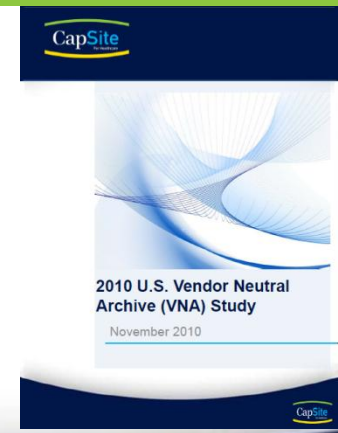
2010 Ambulatory EHR & PM



2010 Remote Radiology

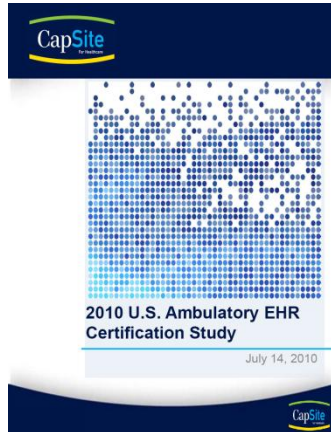


2010 Vendor Neutral Archive (VNA)



Strategic Industry Reports

2010 EHR Certification



2010 Claims Management



2010 PACS / Imaging IT



2010 Ambulatory EHR



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