

Enterprise Clinical Image & Content Management Software Solutions

Executive Summary of Primary Research



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Purpose of the Research

TeraMedica Healthcare Technology contracted with Porter Research to conduct primary market research evaluating the demand for *Enterprise Clinical Image & Content Management Software Solutions* in the large hospital and IDN environment. Specifically, the research explores:

- The challenges large healthcare provider organizations have in managing large-scale clinical content (i.e., medical imaging files, audio clips, documents, and all blob content);
- Critical issues for initiatives related to large-scale image management, and;
- Receptivity to solutions similar to those offered by TeraMedica.

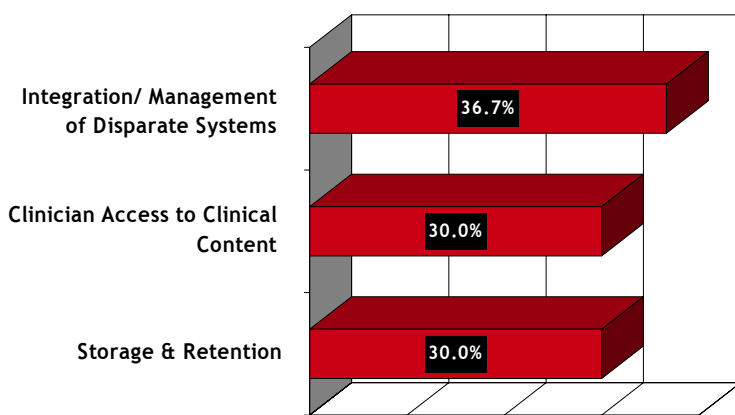
Porter Research completed thirty in-depth telephone interviews with technology leadership randomly selected from large U.S.-based hospitals and health systems. More than eighty percent of the interviews were completed at the CIO-level. This document provides a brief summary of the results obtained.

Challenges Managing Large-Scale Clinical Content

The research began by asking respondents to talk about their greatest challenges managing large-scale clinical content at their organization. Three key challenges emerged.

“Managing disparate systems across the enterprise,” said one CIO. In total, 37% of respondents identified integrating and managing disparate systems as their chief challenge. He continued, “we have so many systems that have different formats and getting them to talk to one another is a challenge.”

Challenges Managing Large-Scale Content - First-to-Mind



Another key challenge discussed by 30% of the sample was related to ensuring clinicians have appropriate and timely access to clinical content. “Our biggest challenge is capturing content in an electronic format wherever we deliver care, ensuring security and then making it available to caregivers at the point-of-care.”

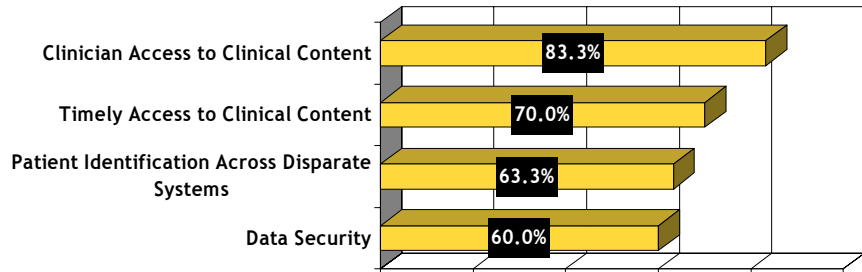
Finally, another 30% talked about storage and retention challenges as a direct impact of growing data files. “Our storage is growing exponentially, so being able to effectively manage the life cycle of data and moving it from expensive, high speed disc to lower cost storage solutions is the challenge. We’ve been working on that for a number of years.”

Another CIO added that the policies affecting retention are complex. “One of the problems is the duration that you have to store information. For adults it might be a minimum of seven years and for a pediatric case of a baby born here it is a minimum of twenty-one years.”

Next, respondents were asked to use a scale from 1 (“Not at all Important”) to 9 (“Critical”) to rate a series of issues to indicate how critical a consideration each is in their initiatives to better manage large-scale clinical content across the enterprise. These results were similar to those that emerged when respondents were asked to discuss their first-to-mind challenges.

The chart to the right displays the percentage of respondents that rated each of the top issues a 9, or critical. “Clinician Access to Clinical Content” at 83% and “Timely Access to Clinical Content” at 70% scored highest.

Challenges Managing Large-Scale Content - % Rating 9 or “Critical”



Together these findings suggest that hospitals are struggling with managing, storing and connecting patient images or other large-scale clinical content across disparate systems and, ultimately, making that information available to the clinician at the point-of-care.

Receptivity to TeraMedica’s Solutions

Respondents were read a brief statement describing key concepts of TeraMedica’s solutions and asked to respond to a series of questions. The statement described “Enterprise Clinical Image & Content Management” technology as follows:

“This middleware interoperability solution provides consolidation of storage architecture and increased interoperability of clinical systems as text, images, or other stored media for a holistic patient centered approach.

It is vendor agnostic, removing proprietary barriers and data migration costs seen in PACS and other systems related to Radiology, Cardiology, Oncology, and Pathology - allowing for control of clinical data.

It also provides a unified image and content view within electronic medical records promoting physician adoption, speed and accuracy of patient care.”

Asked if they believe there is a need for this type of solution in the healthcare market, **86.7% of interviewees responded positively**. Most felt the need is driven by disparity of systems. As one CIO put it, “it will alleviate the need for disparate systems that store medical and clinical images. Disparate systems are difficult to maintain and support, and the systems that are trying to consolidate those together are important advances in technology for health systems.”

Others talked about the potential impact on having better control of data migration projects or system upgrades. “If we have to move from one system to another either via an upgrade or migration to a whole new platform, it’s terribly painful, expensive and difficult to do,” indicated a responding Chief Technology Officer.

Finally, another identified key benefit related to the potential impact on patient care, resulting from improved clinician access to information. “Physicians are all over the place and they want to be able to have access to images immediately. They will have a quicker resolution to how they will treat these patients.”

About TeraMedica

TeraMedica Healthcare Technology is a healthcare informatics company based in Milwaukee, Wisconsin. TeraMedica's software manages the storage and distribution of digital medical images as well as other clinical content across healthcare and hospital systems, gathering images from imaging devices or PACS, storing them, and distributing them to the point of patient care. TeraMedica's technology gives physicians virtual access to image data. TeraMedica's software, Evercore® - Clinical Enterprise Suite, uses an advanced enterprise-scale database and "intelligent", or rules-based, business logic to deliver fast, efficient image management. For additional information, please visit www.teramedica.com.

About Porter Research

Since 1989, Porter Research has delivered primary market intelligence to the healthcare information technology industry. Senior executives with experience leading sales and marketing practices at major healthcare IT companies direct a team of veteran market research specialists to conduct more than 7,000 annual research interviews with decision makers and influencers at all levels of healthcare delivery, from physician offices and hospitals to payers. Our custom B2B market research products enable our customers to develop plans and strategies to take to the market, validate opportunities to improve sales success, and ultimately increase customer satisfaction. For more information, visit www.porterresearch.com.