

Allscripts/Northwell Health Joint Venture Key to Future Growth

Companies: CERN, MDRX, NXGN, VAR

January 21, 2020

Report Type: Initial Coverage Previously Covered Full Report Update Rating: **3.5/5**

Research Question:

How do Allscripts' EHR solutions measure up to competitors? Are its EHR solutions and additional modules driving growth?

Summary of Findings

- [Allscripts Healthcare Solutions Inc.](#) (MDRX) is a strong competitor in the electronic health record (EHR) mid-market, successfully serving small and midsized healthcare facilities, networks, surgery centers, and physician practices. Allscripts' growth is expected to continue in this market and in markets outside the United States in the 5% to 10% range in 2020. This is slightly ahead of Allscripts' full-year 2019 pre-earnings call [announcement](#) of a 2% to 3% year-to-year revenue increase and a 13% to 15% bookings increase.
- Allscripts' growth hinges on its recent [joint development](#) agreement with [Northwell Health](#) to create a next-generation EHR system incorporating artificial intelligence (AI) and voice. Successful development of a new platform vs. reliance on existing products like [Sunrise](#) and [Paragon](#) will drive future growth and is expected to propel Allscripts up market, where [Epic Systems Corporation](#) and [Cerner Corporation](#) (CERN) are leaders in the United States.
- EHR market dynamics are evolving as healthcare system consolidation and physician practice mergers and acquisitions are trending. These situations lead to a single EHR system being selected or mandated, which favors Epic and Cerner. Allscripts' [renewal](#) of long-time customer Northwell Health and their joint development venture are viewed as critical for establishing the company as a viable vendor in the large healthcare system market.
- Allscripts' strengths include a solid reputation with decent user satisfaction levels; offering products that are value based, less expensive than the competition, and that allow for fast implementation; ease of use; and product stability and flexibility. Allscripts was praised for its aggressive acquisition/partnering strategy that provides products and features that meet its customers' needs.
- Allscripts also has a growing global footprint that Doug Brown and his company's annual [EHR user survey](#) has rated the No. 1 global EHR system for customer satisfaction and is the top health system EHR vendor in Canada, Australia, and New Zealand.
- The EHR market is crowded with vendors. One source said there more than 500 providers in the United States. Epic and Cerner are considered leaders in large hospital and large healthcare networks and Allscripts is a leader in the midsize and small market segment. In this report a total of eight different systems were discussed. The other public companies discussed include [NextGen Healthcare Inc.](#) (NXGN) and [Varian Medical Systems](#) (VAR).

Silo Summaries

1) Allscripts Users

Company and product strengths include ease of system implementation; high user satisfaction levels; and product stability, flexibility, and interfacing capability. **Two sources commented on Allscripts' growth potential. One said Allscripts will succeed in the small to midsized hospital and healthcare systems and outside the United States. The other said that their rural healthcare system has extended its Allscripts contract and added new capabilities.**

2) EHR Sales Channel

Three sales professionals expect continued growth for Allscripts. The two Allscripts sources quantified their growth projections at 5% to 10% for 2020. Allscripts will continue its competitive success in the ambulatory, surgery center, and healthcare provider office market niche. The Allscripts sources stressed as strengths the company's high level of customer satisfaction and user-friendly products that are value-based and less expensive than the competition. The Northwell Health joint venture is considered critical for Allscripts and, if successful, could change the market dynamics by propelling them into larger healthcare systems.

3) EHR Integrators

One independent integrator and one Allscripts integrator expect the company to grow between 5% and 10% in 2020. Allscripts' solid past performance, user-friendliness, product compatibility, flexibility, and fast implementation were cited as company strengths that will drive growth. One source said Allscripts will be successful in the ambulatory, surgery center, and small hospital market segments and the other expects some global expansion.

4) Industry Specialists

Allscripts product development and/or acquisitions of new modules and services is the likely future growth driver for the company—vs. its core Sunrise and Paragon EHR platforms, according to these two sources. One said the Northwell Health joint development venture may be a future growth catalyst.

5) Healthcare Professionals Using Competitive Products

One source discussed Allscripts, saying he is aware of a power user that would rate its performance at 8 out of 10. He said Allscripts is not a viable platform for large healthcare networks. **Allscripts' joint development venture with Northwell Health is critical for the company to being considered a suitable EHR platform for large healthcare systems.**

Allscripts Healthcare Solutions Inc.

	Allscripts Performance	Allscripts Growth	Allscripts and Northwell Joint Venture
Allscripts Users	↑	↑	Interesting
EHR Sales Channel	↑	↑	Critical
EHR Integrators	↑	↑	AI is next level
Industry Specialists	↑	↑	May push the future
Healthcare Professionals Using Competitive Products	↑	↑	Critical

Background

Blueshift Research’s initial research found Allscripts entrenched in the booming healthcare IT market. The electronic health records and electronic medical records (EMR) market is expected to experience significant increases over the next few years as it enters a period referred to as its “awkward adolescent stage of growth.” This market is highly fragmented, intensely competitive, and constantly changing. Allscripts is a major player in the space and has experienced its share of competitive wins and losses. Going forward, EHR vendors that improve user interfaces, reduce physician burnout, and provide flexible end-to-end and/or collaborative solutions will prevail.

Expanding life sciences and healthcare industries, along with government initiatives to promote proper maintenance of patients’ electronic health records, are expected to propel the [EHR/EMR market to a value of \\$38 billion by 2025](#), with a 5.5% CAGR from 2019 to 2025.

Allscripts’ third-quarter (Q3) results beat the Street’s earning expectations by 6.3% but narrowly missed its revenue projection by 1.2%. Revenue was up 1.1% year to year. Bookings were up 19.2% from the prior-year quarter and the backlog was \$3.9 billion. Growth was spread across the Provider inpatient and outpatient products like Sunrise and Paragon and its Veradigm franchise. Allscripts confirmed full-year bookings between \$1.05 billion and \$1.10 billion and Q4 revenue growth in the mid-single digits. The company expressed confidence in future growth opportunities in both its Provider and Veradigm businesses.

Allscripts’ Sunrise platform provides a single patient record to deliver more informed patient care. It includes business intelligence and analytics solutions and serves as an end-to-end platform from patient admission to discharge, while combining clinical and financial data for the hospital and health system. Paragon is a platform designed for rural and community hospitals and single healthcare providers. It provides workflow intelligence to locate relevant patient information, presenting the right information at the right time to improve efficiency and patient outcomes.

Allscripts’ confidence stems in part from recent contract wins and extensions. Eight U.S. hospitals and health systems have implemented or announced plans to [deploy](#) Allscripts’ EHR software this year. Allscripts also won an international contract when the Gloucestershire Hospitals NHS Foundation Trust contract was [secured](#). The crowning achievement in Q3 came when Allscripts and Northwell Health announced a contract [extension](#) for its Sunrise platform to 2027 and a partnership to [jointly](#) develop an AI-powered next-gen EHR system.

Allscripts has also received some industry recognition and awards. Frost & Sullivan named Allscripts the [recipient](#) of the 2019 U.S. Company of the Year for its Advanced RCM Services and Black Book rated Allscripts the [No. 1 vendor](#) out of 68 EHR companies for customer satisfaction.

But Allscripts faces challenges from industry stalwarts Cerner and Epic. The KLAS annual report released in April, [U.S. Hospital EMR Market Share 2019](#), suggests that the 2018 trend of Allscripts losing Sunrise and Paragon contracts will continue. Among its findings, the [report](#) found:

Allscripts Healthcare Solutions Inc.

- “KLAS reports only four key vendors remain in the large provider market space—Epic (with 163 hospitals), Cerner (77 hospitals), Allscripts (16 hospitals), and [Meditech](#) [Medical Technology Inc.] (12 hospitals).”
- “Large (500+ bed) hospitals and health systems almost exclusively choose Epic, switching from Allscripts or Cerner.”
- “In 2018, 14 hospitals—nine of which came from one large organization—left the Sunrise Clinical Manager (SCM) platform; all switched to Epic.”
- “16 hospitals left the Paragon platform, moving to Cerner, Epic, Meditech, or [CPSI](#).”
- “Allscripts had a total of 33 hospital losses in 2018, 15% [five losses] of those were due to customer consolidation.”

Current Research

Blueshift Research assessed how Allscripts’ EHR solutions measure up to competitors and whether its EHR solutions and additional modules are driving growth. We employed our pattern mining approach to establish six independent silos, comprising 15 primary sources and five secondary sources focused on the EHR industry. Interviews were conducted December 15, 2019 - January 13, 2020.

- 1) Allscripts users (4)
- 2) EHR sales channel (3)
- 3) EHR integrators (2)
- 4) Industry specialists (2)
- 5) Healthcare professionals using competitive products (4)
- 6) Secondary sources (5)

Next Steps

Blueshift Research will research Allscripts’ joint development venture with Northwell Health to determine if it is producing meaningful EHR improvements that will provide a competitive advantage, solidify its upmarket move, and drive future growth.

Silos

1) Allscripts Users

Allscripts’ products and services are valued by these four users. One user just completed installing Allscripts after years with a rival EHR system—switching because they required interoperability with surrounding Allscripts users. Company and product strengths include ease of system implementation; high user satisfaction levels; and product stability, flexibility, and interfacing capability. Two sources commented on Allscripts’ growth potential. One said Allscripts will succeed in the small to midsized hospital and healthcare systems and outside the United States. The other said that their rural healthcare system has extended its Allscripts contract and added new capabilities. Two sources rated Allscripts’ performance on a 1 to 10 scale. One said IT staff rate Allscripts at 7 or 8, while users are less satisfied, rating it a 4. Another user rated the performance at 6. Areas that need improvement include hosting capabilities, product stability, and product changes that do not achieve goals and seem to only add to navigation challenges. Epic is perceived as the EHR leader; however, it was referred to as a closed system that does not integrate well with other EHR platforms. Meditech and [ARIA Oncology Information System](#)—developed by [Varian Medical Systems Inc.](#) (VAR)—were also mentioned as competition.

Key Silo Findings

Background

- 1 source is an Allscripts implementation specialist at a large healthcare network.
- 1 source is the CIO of a rural healthcare system.
- 1 source is a Vice President of IT at a 350-bed facility and is a new Allscripts user.
- 1 source is an oncologist that has used Allscripts.

Allscripts Performance

- 1 said Allscripts interfaces well with other systems, has high user satisfaction with IT departments, and is successful outside the United States.

Allscripts Healthcare Solutions Inc.

- 1 said Allscripts is stable, configurable, and effective.
- 1 said their Allscripts implementation went well, but there were some stability issues.
- 1 said Allscripts performed better than two other systems he had used in the past.

Allscripts Growth

- 1 said Allscripts will grow in the small to midsized healthcare system market and outside the United States.
- 1 said they have extended their Allscripts contract and added additional capabilities.
- 2 did not discuss.

EHR/EMR Market Conditions and Competitive Landscape

- 1 said Epic is the No. 1 EHR provider and Allscripts is No. 2.
- Meditech and ARIA were also discussed as competitors.

1) Allscripts implementation specialist at a 140,00-medical-visit-per-year healthcare system

Working with Allscripts for more than 10 years at a midsized healthcare system, this implementation specialist sees continued growth of Allscripts due to its strength in customization and interfacing with most systems, its level of user satisfaction (higher with IT than with healthcare professional [HCP] users), and its reach outside the United States. Epic is more like dealing with Apple—a closed system that does not integrate as easily or as well. A shortcoming of Allscripts is with its hosting capabilities, which requires additional vendors and integrators. Their niche is with smaller to midsized healthcare networks.

Background

- “[This] hospital has been using Allscripts systems for the past 10 years [and] moved from [Lastword](#) to Allscripts.”
- “[We have] no plans to switch.”

Allscripts Performance

- “As administrator and supporter of the system and ongoing implementation, I would score it 7/8 out 10. If I were to ask the end-user healthcare professionals, they would probably score it a 4—they are not all that happy about their documentation requirements.”
- “Allscripts’ strength is in its ability to customize and interface with other systems within the network. Epic does not work like that. Allscripts is fairly easy to integrate with other systems and is IT- and doctor-friendly. Epic is more like working with an Apple product—closed, works with Epic systems—whereas Allscripts is more like working with Samsung—open.”
- “Allscripts’ opportunity to improve is with its ‘hosting’ capabilities. A host is a computer that communicates with others to send and receive data and services. Today we use other vendors and integrators to achieve the hosting function.”
- “Allscripts’ best fit is where a healthcare institution needs to integrate with multiple third-party vendors. Their niche is with smaller and midsized hospitals and ambulatory services.”
- “Our service to the system and the users is internal, with a portal to Allscripts for more complicated help and fixes. We staff about 70 people—including the help desk—to support greater than 2,000 users/employees.”
- “The Northwell joint venture is interesting but it is so different. Their system is 10 or 20 times bigger than ours, [so you] can’t really compare [them]. We still need to ‘walk’ with the implementation of our system, as there are still areas/capabilities we can adopt but haven’t. Allscripts has an [Apple Health app](#) for iPhones. The capabilities are there but not yet integrated. Employees need to be ready for this expansion of the program. Same goes for AI—we are not close to incorporating these capabilities.”

Allscripts Growth

- “I perceive that Allscripts will continue to grow at the current levels or higher, in part due to their global reach. They are active in the UK, Canada, Australia. Epic is U.S.-focused. This gives Allscripts a strategic advantage.”
- “We continue to add to capabilities and add Allscripts apps.”
- “We have added the ambulance service to our program. [I] believe we are one of the few to do this in the greater metro area.”

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Allscripts implementation specialist at a 140,00-medical-visit-per-year healthcare system

EHR/EMR Market Conditions and Competitive Landscape

- “Epic is the strongest player in the market. I would say Allscripts is second and all the rest trail.”

2) CIO at a longtime Allscripts customer based in the Northeast

This long-time Allscripts customer recently extended its contract to 2027 and is updating and expanding its use of Allscripts' products. The source described the hospital's relationship with Allscripts as a partnership and said its Sunrise product has been stable, configurable, and effective.

Background

- This medical community serves people living in a mostly rural valley that covers 5,000 square miles. With under 200 beds, this system also has 160 outpatient centers, including those for patients with Alzheimer's, those in need of medical rehabilitation, and even collaborative care.
- “We have had [TouchWorks](#) since 2003 and the Sunrise platform since 2007. We use TouchWorks for ordering prescriptions, documentation, scheduling [and more]. We use Sunrise for inpatient and for the oncology service line.”

Allscripts Performance

- “We have an ongoing working partnership with Allscripts. Sunrise has been stable and configurable, and that has proven to be effective.”
- “TouchWorks—that is the ambulatory EMR—it has been very challenging. We couldn't establish standard use, it has created problems for clinical delivery. The lack of configurability didn't allow us to build higher levels of interoperability.”
- “We are migrating from TouchWorks to Sunrise Ambulatory [Care]. We will have an integrated record when all is said and done.”
- “We have moved to hosted services within Sunrise. Day-to-day availability has improved. Nineteen service lines are using ambulatory, including orthopedic, nephrology, geriatrics, ob-gyn, ophthalmology. They are willing to go through short-term pain.”
- “Tech changes are very disruptive for health care. It's a 24/7 operation. [But] we would absolutely move to a different platform [if need be].”

Allscripts Growth

- “We have extended our Allscripts contract until 2027.”

EHR/EMR Market Conditions and Competitive Landscape

- Did not discuss.

Miscellaneous

- “EMR is about fee avoidance. It is a product designed to capture everything related to billing, as opposed to capturing a clinical story. It's the round peg versus the square hole. We are introducing scribes. We are in the early process of [introducing] natural language processing.”

We have an ongoing working partnership with Allscripts. Sunrise has been stable and configurable, and that has proven to be effective. ... We have extended our Allscripts contract until 2027.

CIO at a longtime Allscripts customer based in the Northeast

3) New Allscripts user at a 350-bed medical center in the Northeast

For this source, assessing whether Sunrise and/or Paragon will help Allscripts grow in the future is premature, as migration to Sunrise Clinical Manager and other Sunrise modules from the center's former system was completed in mid-fall. The system went live in December. The customer chose Allscripts because of the integration pitch. A lot of the other products in hospitals around this source's center are Allscripts. What this source, a 23-year veteran of this center, could say was this: Of the three major installations this person has overseen, Allscripts' installation caused no major headaches. Source and staff are still working out kinks, answering questions, and helping the center's staff members adjust to their new system after primarily using Meditech systems for 16 years.

Background

- “We looked at two systems: Meditech and Allscripts.”
- “The center signed its contract with Sunrise four years ago.”
- “The Allscripts ED and Care Management modules were installed soon after. For the other modules, it took one year to migrate, which was completed in October.”

- “We had a legacy product—we wanted to see what we could leverage. We had Meditech, but we couldn’t integrate it with other products.”
- “In this area, we felt that [integration] pinch, primarily in New York and Long Island. A lot of the other products [in other hospitals] were Allscripts.”
- “The newly installed modules are: Acute Care; Clinical Manager, Sunrise’s core product; Radiology; HIM; Pharmacy; and FollowMyHealth, a patient engagement platform.”

Allscripts Performance

- “The staff has only had [the new modules] for three months. Meditech was here 16 years. It’s a change, a cultural change.”
- “There is a learning curve. They are getting comfortable. It takes three to six months to ask if they are comfortable. If I ask now, I will have a different response from when I ask in another three months.”
- “For us, it’s a new product. New bugs? It’s part of the implementation phase.”
- “Were our goals met? At the moment we haven’t had the opportunity to integrate with other facilities. But, the advantage here is that we can leverage with those hospitals that have Allscripts. We can ask them about things, and I don’t have to reinvent the wheel. I can get the screenshot.”
- “For the first couple of months, we had workflow issues. We needed to stabilize the system.”
- “Implementation was good. But some things didn’t work. In the ED, we had to redo the triage form. There was nothing that prevented patient care.”
- “I knew we would have issues. With billing, some interfaces didn’t cross over, but that is part of the go-live, that is no different than other [go-lives] that I have done.”
- “Of the three major implementations, and lots of minors, this implementation was, headache-wise, low.”

Allscripts Growth

- Did not discuss.

EHR/EMR Market Conditions and Competitive Landscape

- Did not discuss.

4) Hospital-based oncologist in the Northeast

This hospital-based oncologist has used Allscripts for six years and scored it 6 out of 10 for satisfaction. The system is financially driven to maximize billing and associated documentation. Upgrades do not achieve their objective but routinely add to the number of screens and clicks that he must navigate. It is not easy to use. He has moved to a new healthcare system—the largest in New Jersey, with 3 million annual patient visits and 9,000 HCPs—that is switching from numerous systems to Epic in 2021.

Background

- “The oncology hospital in New York where I practiced has been using Allscripts for over six years for in-patient records. For oncology patient coordination between radiology, surgery, and medical oncology, they deployed a system called ARIA.”
- “I have recently moved to a hospital system in New Jersey where three hospital networks are all moving to EPIC in 2021. This is the largest hospital system in New Jersey, accounting for 3 million patient visits and 9,000 HCPs. At least one of the hospitals is currently using Allscripts but will change in 2021.”

Allscripts Performance

- “The Allscripts system I have used was better than the ARIA system and another prior system. ARIA is labor intensive and difficult with writing notes, especially when documentation comes from different records. I’d give ARIA 3 but Allscripts maybe a 6 [out of 10].”
- “Customer support is conducted through internal resources. If there is an issue they can’t solve, they go to the vendors after exhausting what they can do. It seemed to work out fine.”
- “The New York system implemented a number of upgrades to help track workflow, with a tracking board for patients. It didn’t really achieve its goals but did add a lot of extra work, extra clicks, and new screens—adding to our admin time. Most upgrades don’t make things easier, just add clicks, screens, and options—and ultimately our time. They did add to the functionality, but there were a lot of cut and pastes that weren’t so easy to figure out and add to your routine.”

- “It is difficult when multiple healthcare professionals are in contact with one patient and making different data with different words and, at times, additional diagnoses. Some pieces are not easy to add. There are a growing number of dropdown boxes that can’t capture what is needed.”
- “An advantage is that you can see other comments on a patient and where they were referred from in your system as well. Problem with it now is that it takes additional sign-ons and passwords to see the records. This should be fixed.”

Allscripts Growth

- Did not discuss.

EHR/EMR Market Conditions and Competitive Landscape

- “The EHR systems are creating more work. Much of it is ‘finance’ driven to optimize billing, with required documentation. The advantages are that you need that documentation with the patient record. Its disadvantage is that it’s often complex and takes the focus to billing.”

2) EHR Sales Channel

Three sales professionals—including one medical imaging sales rep and one current and one former Allscripts sales rep—expect continued growth for Allscripts. The two Allscripts sources quantified their growth projections at 5% to 10% for 2020. Allscripts will continue its competitive success in the ambulatory, surgery center, and healthcare provider office market niche. The Allscripts sources stressed as strengths the company’s high level of customer satisfaction and user-friendly products that are value-based and less expensive than the competition. The Northwell Health joint venture is considered critical for Allscripts and, if successful, could change the market dynamics by propelling them into larger healthcare systems. Epic is the clear leader for larger healthcare providers, with Cerner also competing successfully in this space. [E-clinic](#) and Meditech are also considered direct competitors to Allscripts.

Key Silo Findings

Background

- 1 source is a sale rep for medical equipment that interfaces with EHR systems.
- 1 source is a current Allscripts sales rep.
- 1 source is a former Allscripts sales rep.

Allscripts Performance

- 3 of 3 were positive regarding Allscripts performance.

Allscripts Growth

- 1 said Allscripts’ growth will continue in the market niche of ambulatory, surgery center, and healthcare professional offices.
- 2 said Allscripts will grow 5% to 10%.
- The Northwell joint venture is considered critical to Allscripts’ future success and could change the market dynamics by propelling the company to service larger healthcare networks.

EHR/EMR Market Conditions and Competitive Landscape

- Epic is the market leader in the large hospital and network market, with a strong reputation.
- Cerner is also competitive in the space, offering low pricing, but then adding fees that can be significant.
- Meditech and e-clinic were also discussed as competitors of Allscripts.

Miscellaneous

- AI is the future of EHR.

1) Account director for hospital equipment manufacturer

This source sells medical equipment that feeds directly into EHR platforms. He has not worked with a hospital that used an Allscripts program but perceives they will continue to be a successful niche player in ambulatory, surgery centers, and healthcare professional offices. Epic is the major player in the larger hospital marketplace where he competes but he believes that the Northwell Health joint venture with Allscripts could change the market.

Allscripts Performance

- “Allscripts’ strength is in ambulatory, surgical centers, and physicians’ offices.”

Allscripts Growth

- “Allscripts will continue to be a successful niche player as long as they play nice with the big boys in transferring data. They are not bad, but limited in what they can do.”

EHR/EMR Market Conditions and Competitive Landscape

- “We sell blood analyzers that feed EHR programs. [I] routinely interface with Epic, Cerner, Meditech, and others. [I have] no interface with Allscripts.”
- “Epic crushes the competition. [They are the [best in billing, best in customization, [and they] complete their implementation every time. The Northwell joint venture development is the exception for Allscripts.”
- “When customers go to Epic, they’re never unhappy. Epic hits you hard up front with their charges, whereas Cerner is less expensive—sometimes 50% less to get the basic system in—but then it’s death by a thousand cuts as the costs run up.”
- “Cerner doesn’t have the reputation that Epic has. They defaulted on a U.S. government build—that wounded their reputation.”
- “At Duke, Epic doubled the amount of billing and data they got through the system.”

Allscripts will continue to be a successful niche player as long as they play nice with the big boys in transferring data. They are not bad, but limited in what they can do.

Account director for hospital equipment manufacturer

2) Allscripts EHR sales executive

This seasoned EHR executive sales rep believes Allscripts has the most user-friendly systems and that 5% to 10% growth is the expectation for 2020. He believes Allscripts customers would rate their satisfaction at 8 out of 10. Allscripts is reorganizing their business units and sales team to better focus on different, client-specific needs: legacy customers, those with clinical priorities, and those with financial priorities.

Allscripts Performance

- “The Professional Business unit focuses on practices [with] one to 50 HCPs in the network. These customers would give Allscripts an 8 out of 10 for its performance.”
- “Allscripts is the most user-friendly system on the market. [We] partner with the integrators to customize for ease of use, access to information.”
- “Allscripts’ Revenue Cycle program is to increase billables and collections. Allscripts gets a percentage of the increase. This can make a huge difference in the income, as well as volume of data. “

Allscripts Growth

- “[Allscripts] recently reorganized the sales force to focus on client difference in the marketplace. Legacy customers will be targeted for upgrades. Clinical priority clients and financial priority clients will have teams focused on their growth. The expectation is growth at 5% to 10%.”
- “[There is a] new VP of sales on the Professional unit.”
- “As Allscripts continues to acquire companies, the clients are presented the broader offering that the acquisitions bring to our capabilities.”
- “[We] continue to improve organically—and by acquisition. The Allscripts Development Store continues to add apps. An example is [Opargo](#), a scheduling app that is very popular, sold as an exclusive in 2019.”

EHR/EMR Market Conditions and Competitive Landscape

- “The EHR market is extremely tough and saturated. Most EHR systems do the same thing but have differences in value-added aspects. The government drove the big idea of sharing patient information, but the interfacing turned out to be very expensive.”
- “[The] market is saturated, but the switching and changing systems is being driven by acquisition and aggregation of healthcare providers. If it’s a big aggregation or just a few offices will dictate what kind of a system is needed.”
- “Allscripts is divided into the Sunrise system for hospitals, the TouchWorks division for networks over 50 providers, and the Professional Business unit for less than 50 providers.”
- “Allscripts has recently split out the practice team from the research team to allow us to concentrate on data collection and retrieval for research-focused clients.”
- “For the Professional Business unit, the main competitor is e-clinic and Epic, occasionally.”

Miscellaneous

- “AI is the future of this business. Northwell ventures presented at our annual sales meetings, as that is on the TouchWorks side of the business. [We] continue to beta test more decision support-like functionality.”

3) Former operations executive for Allscripts

This veteran of Allscripts does not see many differences in the software between Allscripts and the major competitors but sees their strategy as quite different. The major competitors have one strategy: tear down and completely rebuild—but Allscripts has different strategies depending on the customer. He believes Wall Street has penalized Allscripts for that approach and thinks the bigger network acquisitions play into the hands of Epic and Cerner. The Northwell joint venture is critical—not just the potential advances from AI but from the leadership and human learning of an implementation like this. He predicts continued 5% to 10% growth.

Allscripts Performance

- “Allscripts is more value-based than its competitors. It is less expensive, generally.”
- “Comparing finance vs. patient care centricity, Allscripts is a little behind Epic’s patient focus. Not bad, but it has fallen behind.”
- “On the ambulatory side of the business, Allscripts is definitely better. They have invested in the patient experience.”
- “The Northwell joint venture, this will really help Allscripts. The experience they will gain—leadership and functionality—will be key to future success. The concept of AI or machine learning is not new and exists already, but it is not really automated. [The] concept [is] in place but intent is not. This will be dynamic—[to] potentially give stats about outcomes with different treatment methods to potentially better defend against malpractice. I don’t know the timing of Northwell. Some of this has been in play, now it’s stepping up.”

Allscripts Growth

- “Over time Allscripts has been tied to smaller bed-size and patient loads, even though they are less expensive. For a hospital CEO who has completed a large acquisition, despite potential savings with Allscripts, it is job protection to go with the better recognized Epic. Like picking SAP [SE/SAP] or Oracle [Corp./ORCL]—[it] may be a big ticket but they are supposed to do it right. [They] won’t get fired for spending more on Epic”
- “I think Allscripts will continue to grow at the current rates, in the 5% to 10% rate. They have a great CEO in Paul Black who really knows what is going on and has the pulse of their financial health.”

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Former operations executive for Allscripts

EHR/EMR Market Conditions and Competitive Landscape

- “There really is not a lot of difference among Epic, Cerner, and Allscripts. Allscripts is the better company to use for implementing [a] system when it does not need a full replacement or full integration and that is not enormous. It better fulfills a niche need. Think of it like a house that is outdated. You can either redesign and fix the areas that are outdated—the kitchen, bathrooms, add a deck—or you can do a total tear-down and rebuild. Epic and Cerner are the tear down/rebuild.”
- “Henry Ford said, ‘A customer can have a car painted any color he wants as long as it’s black.’ You can say the same thing for Epic and Cerner. They have one strategy: tear it down and rebuild. Allscripts has multiple strategies to best address the need of each customer. I think Wall Street has penalized up for that approach.”
- “Allscripts grew out of an ambulatory system. Through multiple acquisitions in the ‘00s and early 2010s, they became successful with acute care and ambulatory, and better able to address the data needs of teaching hospitals and research.”
- “Allscripts fills in the gaps in EHR systems that need updating. They do it without ripping out all the active systems. Other conversions have to redo everything.”
- “Consolidation of the provider institutions is prevalent and, the bigger they are, the more money there is in the merger fund to finance a teardown and total rebuild. Despite the costs, they will go with an Epic or Cerner.”

3) EHR Integrators

One independent integrator and one Allscripts integrator expect the company to grow between 5% and 10% in 2020. Allscripts' solid past performance, user-friendliness, product compatibility, flexibility, and fast implementation were cited as company strengths that will drive growth. One source said Allscripts will be successful in the ambulatory, surgery center, and small hospital market segments and the other expects some global expansion. Epic and Cerner are Allscripts' key competition and both are said to be superior at conforming to government regulations. However, Epic is unaffordable for many hospitals.

Key Silo Findings

Background

- 1 source is an independent EHR systems integrator.
- 1 source is an Allscripts Integrator.

Allscripts Performance

- 2 sources praised Allscripts, citing its solid past performance, high customer satisfaction level, user-friendliness, product compatibility, flexibility, and speedy implementation process.

Allscripts Growth

- 1 said Allscripts would grow 5% to 10% in 2020 in the ambulatory, surgery center, and small hospital markets.
- 1 said Allscripts growth would be 10% as it expands its global footprint.

EHR/EMR Market Conditions and Competitive Landscape

- Epic and Cerner are Allscripts' key competition and both excel at meeting government regulations.
- Epic is considered unaffordable for most small hospitals.

Miscellaneous

- 2 sources stressed the need for the EHR market to incorporate AI into its systems.

1) Independent EHR activation support specialist

This integrator for primarily Epic systems believes Allscripts will continue to grow at the 5% to 10% rate due to their strong niche in the ambulatory, surgery center, and small hospital market. Smaller networks cannot afford a program like Epic. Allscripts' focus on the healthcare provider who is using the system makes it the most user-friendly on the market and produces happier employees.

Allscripts Performance

- "A strength of Allscripts is it has been solid in the market for many years. It is compatible and flexible with other systems that you find in most hospitals, meaning it fits in very well in most every hospital."
- "Allscripts' strength is they are the most user-friendly system in the marketplace. Allscripts is friendlier for the network employee for entry, searches, and everyday use."
- "Allscripts interfaces well with the [PACS](#) [picture archiving and communication system] for sharing x-rays and other imaging, where other competitive software doesn't interface as well."
- "Epic and Cerner allow you to view records for a patient regardless of the provider, as long as that provider is on an Epic or Cerner program. Allscripts cannot do this as well."

Allscripts Growth

- "Allscripts should grow at 5% to 10%. They have a strong niche with the ambulatory medicine and smaller hospitals. Employees are very happy using Allscripts. This is increasingly important."
- "With government regulations and requirements, they will not grow like other platforms but still will show growth as they play an important role in migration to upgraded systems. Government regulations are extremely important and Epic and Cerner better address these constraints."

EHR/EMR Market Conditions and Competitive Landscape

- "One of the biggest determinants for selection of EHR is based on government regulations, especially with [e-Rx](#)."

Allscripts should grow at 5% to 10%. They have a strong niche with the ambulatory medicine and smaller hospitals. Employees are very happy using Allscripts. This is increasingly important.

Independent EHR activation support specialist

Allscripts Healthcare Solutions Inc.

- “Many hospitals cannot afford the cost of an Epic implementation.”
- “Allscripts is for smaller organizations, with a ceiling of 200 beds and associated employees.”

2) International implementation consultant for Allscripts

This international implementation consultant for Allscripts believes Allscripts clients score their satisfaction as a 9 out of 10 due to their strength in customization and accelerated implementation. Due to Allscripts’ increasing global footprint, they should grow 10% in 2020. Areas where clients request improvements are with user interface and revenue cycle management. This source believes the industry must improve in the areas of artificial intelligence and reducing physician and staff burnout.

Allscripts Performance

- “Our clients would report a level of satisfaction of 9 out of 10.”
- “Allscripts’ strengths—where the clients are most satisfied—is with our customization, per their request, and accelerated implementation. Company-wide, we are implementing EHR systems in greater than 300-bed capacity hospitals in 18 months [vs. other vendors in 36 months].”
- “Business intelligence, analytics, and integration are where clients are most satisfied.”
- “Areas where our clients request improvements are with user interface and revenue cycle management.”

Allscripts Growth

- “Allscripts should grow 10% in 2020 due to an increase in their global footprint.”

EHR/EMR Market Conditions and Competitive Landscape

- “EHR needs to improve and make it more user-friendly and less work-intensive to help to reduce physician and staff burnout.”
- “Artificial Intelligence is the next level for EHR systems.”

Allscripts should grow 10% in 2020 due to an increase in their global footprint.

International implementation consultant for Allscripts

4) Industry Specialists

Allscripts product development and/or acquisitions of new modules and services is the likely future growth driver for the company—vs. its core Sunrise and Paragon EHR platforms, according to these two sources. One said the Northwell Health joint development venture may be a future growth catalyst. He said Allscripts’ Sunrise is an older product and that Paragon is not cloud-based and is not appropriate for large healthcare systems. The other source, Doug Brown, said Allscripts’ market sweet spot is servicing 100- to 250-bed facilities. He added that Allscripts is a value leader that it is acquiring the right companies with products that meet its customers’ needs. The Annual State of Global EHR Research report conducted by Mr. Brown’s company in 2019 surveyed 4,056 hospitals and health systems that use EHRs and found that Allscripts was No. 1 of 68 EHR vendors for user satisfaction. Also, Allscripts was named the top health system EHR vendor in Canada, Australia, and New Zealand. The EHR competitive landscape is crowded—one source said there are more than 500 EHR vendors in the United States and everyone below the top 25 are simply trying to survive. He added that many EHRs are contracting as hospitals are acquiring clinical practices and migrating them to a single system. Mr. Brown said Allscripts is the No. 3 system in the United States and No. 1 in the UK and Australia. Epic and Cerner are Allscripts’ primary competition. Epic is focused on large healthcare systems, but one source said they are overpriced and do not share their data. Cerner offers strong financial systems, but is not considered strong on the clinical side.

Key Silo Findings

Background

- 1 source is a former Practice Fusion and Allscripts executive.
- 1 source, Doug Brown, is the founder of [Black Book Market Research](#) that conducts an annual EHR survey.

Allscripts Performance

- 1 said Allscripts acquisitions rarely are successful, but he expects the Northwell Health joint development venture to produce incremental improvements.
- 1 said Allscripts has overcome a poor past reputation and is now well regarded. He said it is the EHR value leader.

Allscripts Healthcare Solutions Inc.

Allscripts Growth

- 1 said growth potential may come from the Northwell venture.
- 1 said growth will come from product development and acquisitions.

EHR/EMR Market Conditions and Competitive Landscape

- 1 said the U.S. market is 85% to 90% saturated. It is crowded, with more than 500 EHR vendors, and all but the top 25 are struggling just to survive.
- 2 said Epic and Cerner are Allscripts' primary competition.

Miscellaneous

- 1 said Allscripts is successful in the UK.

1) Former Practice Fusion and Allscripts C-suite member

Allscripts is not depending upon either Paragon or Sunrise to drive the company's growth in the future, foreseeable or otherwise. Allscripts's future growth may hinge on the success or failure of its joint development project with Northwell. Sunrise is an older EHR system, so it is possible that Allscripts will abandon it for the more recently acquired Paragon. But Paragon is not cloud-based, nor is it designed for large (more than 350 beds) hospital systems. Paragon is designed for small to mid-sized nonambulatory health systems. Allscripts is the largest ambulatory-based EHR provider.

Allscripts Performance

- "Allscripts buys and shed [companies] later on. It's their business strategy [to net] X amount as a result of the purchase. But they typically don't. If they don't deliver, then they cut back."
- "Allscripts has sold off a bunch of businesses. That is what I hear it is trying to do with Paradigm."

Allscripts Growth

- "It's fairly public knowledge that Northwell is a huge client. Given that Paragon and Sunrise are not one or two in market share, they never experienced a lot of investment. Sunrise is an older navy battleship; Allscripts bought Paragon to make it bigger stronger faster."
- "Will Northwell push to the future? It may, and with another system. There will be either incremental improvements and picking off others or trying to hold on to what they have."

EHR/EMR Market Conditions and Competitive Landscape

- "[The] EHR market is penetrated 85% to 90%; there is a long tail out there. As doctors move to hospitals [after practices are bought out], there is a consolidation of the long tails. Any [EHR systems] below the top three to four [positions in market share] is typically trying to figure out how to survive. Anybody below the top 25 is trying to stay alive."
- "There are a lot of regulations. I don't see interface improvement coming."
- "The reality of it is, 90% of MDs have EHRs, but what is their market share in the U.S.? What is the penetrating event? It is buying a group of doctors. In North Carolina, all medical records get transferred to another system."
- "More [EHR companies] are experiencing attrition."
- "Attrition usually happens when a large merger happens, then you spend money to upgrade."
- "The majority of health care is provided by physician's assistants and nurse practitioners; the algorithms are set up by innovative systems."
- "Practice Fusion was cloud based. We had 10,000 physicians engaging on a daily basis. Epic and Cerner have different systems, they are just trying to figure out which ones will survive."
- "Cerner and Epic have made themselves names among health systems. The pain to switch from one to another is significant."
- "Allscripts is known for its ambulatory system. Paragon is a [McKesson \[Corp./MCK\]](#) acquisition, which is a hospital-based EMR, and related to its own system, Sunrise. These EMR companies have their own systems, but instead of fixing them they go out and buy a company, like Practice Fusion. Allscripts tried to do a cloud-based system and it failed miserably."
- "Epic has always been a leader of hospital-based EHRs."

[The] EHR market is penetrated 85% to 90%; there is a long tail out there. As doctors move to hospitals [after practices are bought out], there is a consolidation of the long tails. Any [EHR systems] below the top three to four [positions in market share] is typically trying to figure out how to survive. Anybody below the top 25 is trying to stay alive.

*Former Practice Fusion and Allscripts
C-suite member*

- “One of the big problems today is that systems should speak to one another but they do not. There are 500 EHR companies in the U.S. A lot of this information is in structured data. This creates new problems—no one is looking at the whole environment and saying ‘What does every EMR need to have?’”
- “On one end of the system is the solo practice and at the other end is the Cleveland Clinic [with 1,500 beds]. The reality is that Duke Medical Center [which has 957 beds] will always be out there. Epic powers Duke and Cleveland.”
- “The integrators bring base knowledge of their systems, but [because they have made so many modifications] they have become legacy systems.”

2) Doug Brown, Black Book Market Research

In the nine years that Black Book has been surveying users about their EHR experiences, Brown has witnessed Allscripts gain respect among EHR stakeholders. In the beginning—2010 through 2014—Allscripts users grumbled nearly in unison about interoperability issues, even service problems. But not today. [Brown’s survey](#) shows that Allscripts holds the No. 3 spot in market share in the United States and, in other places in the world, like the UK and Australia, it holds the No. 1 spot in user satisfaction. Allscripts’ willingness to meet the customer’s needs, including budgetary, and acquisition of companies whose software adds value and complements Allscripts’ existing product line were cited as reasons its reputation and performance have improved.

Background

- “The physician EHR survey has about 15,000 respondents; there are 4,000 respondents for the inpatient EHR survey. All told, 600,000 stakeholders respond to Black Book’s myriad health IT surveys.”
- “In the beginning, we went to the hospitals and asked [various people] to find us the right staffers to respond to the surveys.”
- “We really try to get a responsible number who use that product.”
- “The global surveys started in 2007; 7,000 stakeholders have signed up to be participants.”
- “The physician’s survey is released before the HIMSS [Healthcare Information and Management Systems Society] conference.”

Allscripts Performance

- “When we started surveying in 2010, Allscripts was a poor [showing]. There were implementation issues, not sure about leadership issues. In 2013, 2014, Allscripts was never good—not the product, but more the service.”
- “Epic was overpriced and expensive. If there was a fight over [say Columbia Healthcare], the customer went to Meditech. If it was a small town, and the two hospitals wanted to upgrade, the hospitals went with the same EHR so they didn’t have to retrain the nurses.”
- “Cerner bought Siemens [Health Services] because Siemens had an outstanding financial package, but not the clinical package.”
- “The market [became] saturated. There wasn’t a big spend on a big engine.”
- “These things were costing so much—it slowed Epic.”
- “Allscripts was the value leader then, and they still are.”

Allscripts Growth

- “Allscripts looked at their client’s needs: Do they need financial? Infection control? They saw McKesson had these modules.”
- “Allscripts started acquiring these small EHR companies. McKesson did not make any fixes to the Paragon system, which Allscripts acquired.”
- “The other piece is the interoperability part. Epic doesn’t share patient data—that puts the onus on the patient.”
- “There are things still here that some systems need, like population health, revenue cycle, interoperability. This is why Allscripts will do well.”
- “As for Northwell, it is a long-term client. It is important to keep them. Whatever it took to get the deal made—if they can keep those network clients, they have to. Everyone knows whose clients are whose.”

EHR/EMR Market Conditions and Competitive Landscape

- “The Big Three have carved out their own niches, both by action and reaction.”

Globally, Allscripts does really well. NHS does regional decision making, but it lets its doctors decide on what EHR they want to use. They say, ‘We are used to Allscripts, let’s use it in the hospitals.’ Since they have a good presence in England, Allscripts is continuing to move.

Doug Brown, Black Book Market Research

- “As it stands now, Epic likes big hospitals, especially academic teaching hospitals like Sloan-Kettering. Cerner is busy with its contract with the Veterans Administration and Allscripts is pursuing systems with 100-250 beds that need complete services.”
- “Allscripts is buying the right pieces.”
- “Globally, Allscripts does really well. NHS does regional decision making, but it lets its doctors decide on what EHR they want to use. They say, ‘We are used to Allscripts, let’s use it in the hospitals.’ Since they have a good presence in England, Allscripts is continuing to move.”
- “Epic concentrates on the academic hospitals; they are trying that over there [in the UK].”
- “In the German-speaking countries there are niche providers; that could build a market.”
- “Meditech isn’t moving over there. Allscripts has a good presence in Canada. Allscripts is getting attention because of its progress and value—they will price to win a region.”

5) Healthcare Professionals Using Competitive Products

Four healthcare professionals discussed their EHR systems. Three use Epic and one uses NextGen. Only one source discussed Allscripts, saying he is aware of a power user that would rate its performance at 8 out of 10. He said Allscripts is not a viable platform for large healthcare networks. Allscripts’ joint development venture with Northwell Health is critical for the company to being considered a suitable EHR platform for large healthcare systems. One source that specializes in assisting acquired specialty medical practices to migrate to NextGen said to survive EHR vendors need to specialize. An Epic user said user satisfaction is very low, rating it at a 3 out of 10. Another Epic user said he sees very little difference between EHR programs. He added that Epic is starting to add niche solutions to their product offering. Cerner was discussed by one source that said it is appropriate for large networks and its strength is in patient care, where Epic is strong in research and patient data access.

Key Silo Findings

Background

- 3 sources are Epic users.
- 1 source uses NextGen.

Allscripts Performance

- 1 said Allscripts’ customer satisfaction is high, according to a power user that rates their satisfaction at 8 out of 10.

Allscripts Growth

- 1 source said Allscripts’ joint development venture with Northwell Health is critical to the company and its product being considered suitable for large healthcare networks.

EHR/EMR Market Conditions and Competitive Landscape

- 2 said healthcare networks are expanding and acquiring practices and then migrating the organizations to one EHR system.
- Epic and Cerner are systems that are associated with large healthcare networks.

1) Administrator for Mid-Atlantic healthcare network

This seasoned senior hospital administrator sees the strong trend of healthcare network acquisitions as the determining factor for the growth of EHR platforms. Epic and Cerner are the choices for the larger networks, with Epic stronger for a research focus and Cerner for a patient focus. Allscripts is not perceived in the industry as a viable platform with larger networks. Allscripts’ joint venture with Northwell Health to develop an AI EHR platform is critically important to their future to transform them into a stronger player in the consolidating healthcare marketplace.

Background

- “I’ve been involved with an EMR program since their inception at a number of healthcare systems in New York State, Virginia, and North Carolina.”
- “My current hospital had in-house legacy systems when I joined their organization. They were very good in that they directly mirrored their processes, their way of doing things.”

- “As we grew and acquired, I was active on the committee to choose a new EHR. We evaluated Epic and Cerner, as they were the best able to handle our network of 15 hospitals, 1,000+ healthcare professionals.”
- “I would describe Epic as a billing system with medical information in the way. It works for healthcare only because of the medical documentation that is required to be collected and aggregated.”
- “When I visit my primary care physician it takes 31 clicks in the Epic system to order a flu shot.”
- “Epic has made one significant improvement in our system: instead of the sign-ins and passwords to access and navigate the system, your security badge has a QR code on the back that, when scanned, gives you access to the EHR.”
- “The decision to use Epic vs. Cerner: Cerner was designed more for patient care but Epic markets itself as setup for research with the strongest access to patient data. This was very appealing to the med school and research side of the organization. Unfortunately, it did not live up to expectations and wasn’t that good. Epic was more expensive, but the research capabilities won the day.”

Allscripts Performance

- “I work with one nurse practitioner who uses Allscripts every day to request prior authorizations and approvals. She is a power user and likes the system—[she] would rate it an 8 of 10. The data is easy to find and process easy to master, but the healthcare professional is using it all the time. The only issue she reports is that the system goes down a fair amount, but I don’t know if that is an Allscripts problem or a local problem. It is a family practice office with five providers.”
- “It is very disruptive and expensive for a healthcare system to change EHR platforms. It costs millions. Our system budgeted \$120 million to get all hospitals, healthcare professionals, etc. on the new systems—15 hospitals, approximately 5,000 healthcare professionals. For one 700-bed hospital [with] 1,500 healthcare professionals it took over one year to implement. There are continuous changes and improvements with a dedicated support staff focused on EHR.”
- “A small practice could probably do it in three months.”

Allscripts Growth

- “The Norwell Health venture with Allscripts should be very important, especially with the goal of developing an artificial intelligence platform. This is very significant.”
- “For Allscripts to continue to thrive, they must be able to better aggregate data—for research and population data. The Northwell Health joint development venture to develop Allscripts’ next generation AI platform is very important to their ability to grow in this marketplace.”

The Northwell Health joint development venture to develop Allscripts’ next generation AI platform is very important to their ability to grow in this marketplace.

Administrator for Mid-Atlantic healthcare network

EHR/EMR Market Conditions and Competitive Landscape

- “The major factor with who wins and who loses will be driven by hospital and network acquisitions, as EHR penetration is very high and the costs and disruptions to change systems is so great. The decider becomes more about the acquiring organization. Epic and Cerner are built for the bigger networks. The bigger the network gets, the more your requirement is for a system to manage the size.”
- “If the driving force within the network is for patient care, the platform should be Cerner.”
- “If the driver is research and teaching institutions, Epic has the advantage.”

2) A well-traveled, client-focused EHR specialist for a national specialty medical group

For an electronic health record company to survive in today’s market, it must find its own niche. It is the way her company has survived for 40 years, this source says. For the last 15 years her company has only used one EHR manufacturer, NextGen Healthcare. While it did consider switching at one point, the only serious contender was Epic. Her interaction with Allscripts has been negligible.

Background

- “I have been working with EMRs since 2007. I have worked here four years.”
- “My company only deals with certain specialties. Our branches buy certain specialists, certain pediatrics, and high-risk pregnancies. It’s a very niche market. We seek out those practices that are independently owned. We acquire the doctor’s practices and we convert the EMRs.”

- “We take over administration, HR, payroll processing.”
- “I help my company by going onsite to these recent acquisitions. There are two branches to every EMR. There is the front office, where you are checked in and so on. That is the practice management side. Then there is clinical management; I deal with the clinical documentation.”
- “I don’t know if any of the bought practices had Allscripts as their EHR.”
- “We don’t interact with hospitals, [but] we will seek out practices with hospital rights—neonatologists, high-risk pregnancies destined for the neonatal intensive care unit [NICU].”
- “When we do an acquisition, the goal is to get the referral. We may do four, five acquisitions a year. They are targeted and intentional.”
- “We use the NextGen product. We are a client of NextGen.”
- “We buy NextGen out of the box, then we do a fair amount of customization; there is no EMR that will nail [what these practices need] out of the box.”
- “They did consider using another software company. Historically, I know they researched other platforms. The only other contender was Epic. Epic offers robust templates, it covers more specialties, it is hospital- and outpatient-based. NextGen doesn’t have outpatient-based.”
- “They have been using NextGen at least 15 years. They continue to stick with product. Yes, NextGen has made tweaks, we are pretty big clients. But NextGen wants votes [from its clients] to make changes globally, that is why we do it. It is more cost effective.”

Allscripts Performance

- Did not discuss.

Allscripts Growth

- Did not discuss.

EHR/EMR Market Conditions and Competitive Landscape

- “The trends are for [acquiring practices] and going towards hospitals in order to get the referral.”
- “Definitely, niche markets are the [business model] trend. In 2007, when EHR was mandated, everybody had to be in EMR. The government was giving huge amounts of money incentives. That was a big wave, 2008, 2009, 2010. I was consulting then. In 2014, 2015, the government loosened up, the hot topic was meaningful use. Now it’s, ‘Eh. What is the hottest criteria?’ It’s a moving target.”
- “Going niche is the way to survive. To be blunt, it’s where the money is—high-risk pregnancy, NICU. That is why we don’t practice general medicine. We don’t even do adult care. This model has worked for my company for 40 years.”
- “The hospital side is not as complex as the private practices. Hospitals are cut and dried. Epic and Cerner are pretty vanilla. The tech puts in what’s been happening, and then it moves on to the practitioner. Every doctor practices differently, too.”
- “You can do data mining on this EMR. if I was a doctor shopping for an EHR, I would make sure I could extract data from it.”

3) Academic oncologist in Boston

This hospital-based specialty physician in the Partners Healthcare system was switched from a legacy system to Epic in 2015 and scores the Epic system with a 3 out of 10. He sees it is a financially driven system to maximize billing, rather than to facilitate good quality patient care. Updates to the system disrupt their routines—with no clear benefits. The healthcare system has no apparent plans to make major changes or replace Epic.

Background

- “In 2015 Partners Healthcare—that includes Mass General, Brigham and Women’s, Dana Farber, etc.—changed from a disparate collection of legacy and home-grown EHRs to Epic.”
- “Most of the healthcare professionals hate Epic. It has some plusses but is not user-friendly and is clearly designed to maximize billing potential, rather than to facilitate good quality patient care and/or clear documentation.”
- “My satisfaction with Epic is a 3 out of 10.”
- “I’m not aware of any plans to change or replace the system and I believe Partners is financially committed to continuing to use Epic.”
- “I don’t have extensive experience with their customer support but overall the system is pretty notorious [for] making unnecessary updates that lead users [to] having to change the way we do certain tasks and/or find certain

information—with no obvious tangible benefit. My understanding is that this is pretty ‘par-for-the-course’ for Epic. The bean counters love it, but the users hate it.”

Allscripts Performance, Allscripts Growth, EHR/EMR Market Conditions and Competitive Landscape

- Did not discuss.

4) Hospital network analyst/trainer for Epic billing systems

This hospital network in-house analyst came on board to work a conversion from McKesson to Epic. He believes there is little difference in software platforms and that hospitals overstaff with inexperienced IT professionals to do the conversion when they need to look for more skill and fewer people. Epic has added the [‘App Orchard’](#) to address more niche needs for customers, something they had been missing in the past.

Background

- This Epic billing analyst has no experience with Allscripts but has worked with similar systems.
- “All the technology you need and could use is in the systems and is not different from system to system. Fifteen years ago, there were probably more gaps system to system but today, in terms of capabilities and quality, I believe it’s more about the people in the functional area that make the biggest difference. Integrated networks throw a lot of lower-skilled, entry-level programmers at system implementation when they need to hire fewer, but smarter and more motivated, people to get a much better result.”
- “Epic is changing and adding more niche solutions to respond to customer needs. An example is the suite of apps now available—the App Orchard. They have hired third-party programmers to develop apps to address specific niche problems that they didn’t address in the past. These tend to be more patient-oriented solutions with more bells and whistles.”
- “Our hospital network changed from McKesson to Epic five years ago when I started. [They] used [Athena \[Health\]](#) for the ambulatory side of the business.”
- “We rely on end users to recommend where we need enhancements, where we can improve.”

Allscripts Performance, Allscripts Growth, EHR/EMR Market Conditions and Competitive Landscape

- Did not discuss.

Secondary Sources

These five secondary sources focused on Allscripts contract extensions, an AI partnership, new system implementations, and top-performer recognition.

Jan. 15 Becker’s Healthcare [article](#)

PIH Health extends and expands its Allscripts agreement through 2025.

- “PIH Health announced on Jan. 15 that it [extended](#) through 2025 its agreement with Allscripts, which provides the Whittier, Calif.-based health system with solutions, services and outsourcing engagement.”
- “Three things to know:
 - 1. PIH Health entered its contract with Allscripts in 2004 and has implemented the EHR vendor’s Sunrise EHR, TouchWorks EHR and population health software CareInMotion across its network.
 - 2. The nonprofit health system comprises three hospitals, various outpatient medical offices and a multispecialty medical group.
 - 3. Under the new expansion, PIH Health will expand its use of Allscripts’ products to PIH Good Samaritan Hospital, which the organization recently acquired.”

Jan. 13 EHR Intelligence [article](#)

Allscripts partners to provide an AI patient triage platform to clients.

- “Allscripts has [announced](#) a partnership with MyndYou Inc., a science and AI neuroscience solution, to promote better population health management, monitor high-risk triage patients and reduce their chances of hospitalization.”

Allscripts Healthcare Solutions Inc.

- “The partnership between the two companies will work to identify patient health risks in the home and then relay this information to the care team to intervene and prevent hospitalization.”
- “‘By partnering with MyndYou, we can create additional touchpoints between Allscripts clients and their high-risk patients,’ said Tina Joros, general manager of Open Business Unit at Allscripts. ‘MyndYou’s cognitive-driven solution empowers care management teams to reduce hospitalizations and achieve improved outcomes by passively and precisely identifying those in need of extra attention at the right time.’”
- “The MyndYou app detects changes in behavioral function, such as walking, driving, sleeping or voice changes. Then, it alerts healthcare professionals of these changes. Once identified, clinicians can identify potential deterioration to make a hospitalization decision.”
- “The vendor’s virtual care manager, Eleanor, makes personalized calls to patients with questionnaires to learn more about the patient’s health and safety status. Eleanor then creates a highlighted transcript for care management teams to follow.”
- “‘Our mission is to scale care and improve the quality of life of older adults by bringing together cutting edge technology with the human touch in order to keep them safe and functioning within their home environments for longer,’ said Ruth Poliakine Baruchi, CEO and co-founder of MyndYou.”
- “This is another example of Allscripts continuing to make its imprint into the next generation of EHRs by the way of partnerships.”
- “In October 2019, the EHR vendor and Northwell Health, New York’s largest health system, [partnered](#) to create a next-generation EHR.”
- “This next-generation EHR will be [cloud-based](#), voice-enabled, and artificially intelligence-based. It will be designed and tested by Northwell’s clinicians, technology experts, and administrators with the goal of it being deployed throughout the health system.”
- “The product will enhance healthcare delivery to improve the experience for both clinicians and patients alike, the organizations said.”
- “‘We are excited about the possibilities that this alliance with Allscripts will generate,’ Michael J. Dowling, Northwell Health’s president and CEO, said of the partnership. ‘Coupling Allscripts’ technology expertise with Northwell’s clinical and operational strengths will enable us to create a dynamic, patient-facing tool that will arm clinicians with knowledge to provide exceptional care to our patients.’”

Jan. 13 PR Newswire [article](#)

Allscripts receives recognition as a top-performing analytics vendor.

- “Black Book polled 3,190 professionals in 748 healthcare organizations in Q2 through Q4 2019 to develop the annual comprehensive industry report on the state of the adoption, implementation and current utilization of analytical software and service programming. The recognized top-performing vendors, based on client experience and customer satisfaction indicators in strategic project planning for 2020, earned top honors as the highest-rated overall healthcare technology vendors for the niche of client or industry type application in use.”
- “Black Book Market Research LLC measures customer satisfaction across 18 copyrighted key performance indicators: Strategic Alignment of Vendor Offerings to the Client’s Mission and Goals; Innovation and Optimization; Training and Education; Client Relationships and Cultural Fit; Trust, Accountability, Ethics and Transparency; Breadth of Offerings; Deployment and Implementation; Customization; Integration and Interfaces, Interoperability and Connectivity; Scalability and Client Adaptability, Vendor Staff Expertise and Performance; Reliability; Brand Image and Marketing Communications; Marginal Value Adds; Vendor Financial Viability and Managerial Stability; Data Storage & Cybersecurity Measures; Support and Customer Care; and Best of Breed Technology and Process Improvement.”
- “The top-performing analytics vendors in 2020 according to implemented analytics client sites are:
PROVIDER ANALYTICS SOLUTIONS
BUSINESS ANALYTICS SOLUTIONS: **INFORMATION BUILDERS**
CLINICAL ANALYTICS SOLUTIONS: **VIZIENT CLINICAL DATA BASE**
EHR-BASED ANALYTICS & SUPPORT: **ALLSCRIPTS**
ADVANCED ANALYTICS SOLUTIONS, HEALTH SYSTEMS: **HEALTH CATALYST**
BUSINESS INTELLIGENCE DASHBOARDS: **LOOKER**
QUALITY MANAGEMENT ANALYTICS: **VERGE HEALTH**
FINANCIAL DECISION SUPPORT SYSTEMS: **EPSI DECISION SUPPORT**

CLINICAL DECISION SUPPORT SYSTEMS: WOLTERS KLUWER”

Dec. 18, 2019 Healthcare IT News [article](#)

Gloucestershire Hospitals NHS Foundation Trust goes live with Allscripts' Sunrise.

- “One of the largest NHS trusts in England has gone live with the Allscripts Sunrise EPR, five months after signing a contract with the US health IT giant.”
- “Located in the south west, Gloucestershire Hospitals NHS Foundation Trust provides acute services from two hospitals, Gloucestershire Royal and Cheltenham General, in addition to maternity services at Stroud Maternity.”
- “The organization announced that it would be working with the Chicago-headquartered company in May this year. It initially planned to start the implementation process the following summer, however, the deployment was later moved to an earlier date to help its staff cope with the demand expected by the NHS this winter.”
- “Allscripts was rated as the top EPR vendor for UK and Ireland in a report released by Black Book Market Research in September – you can read more about their research [here](#).”
- ““We have delivered a very successful initial rollout in a short timeframe thanks to the dedication and commitment of both GHFT [Gloucestershire Hospitals NHS Foundation Trust] and Allscripts staff. We are determined to push on and achieve our aim of using technology to support the kind of high-quality care that our patients deserve, and our staff aspire to deliver,” Hutchinson added in a statement.”
- “Richard Strong, vice president and managing director of Allscripts for EMEA, said: ‘We look forward to working with the trust on further deployments and on helping it to achieve its stated ambition to join the select band of HIMSS 6 trusts in the UK.’”
- “Gloucestershire now intends to deploy the system at Cheltenham General Hospital next year.”

Dec. 11, 2019 EHR Intelligence [article](#)

Wyckoff Heights Medical Center launched the Allscripts Sunrise EHR.

- “Wyckoff Heights Medical Center in New York has [finished](#) its EHR implementation of the Allscripts Healthcare Solutions Sunrise EHR platform, coming as a part of the hospital’s plan to boost patient satisfaction and address clinical burnout.”
- “The medical center also implemented Sunrise Acute Care, Sunrise Revenue Cycle, Sunrise Radiology, *Sunrise HIM*, Sunrise Pharmacy, and the patient engagement platform, FollowMyHealth.”
- “We selected the Sunrise comprehensive platform to help us drive better care delivery while promoting high levels of patient satisfaction and lowered clinician burnout,” said Ramon Rodriguez, president and CEO of Wyckoff Heights Medical Center.”
- “This latest EHR implementation comes as Allscripts makes continued headway in New York.”
- “In October 2019, Northwell Health, New York’s largest health system, and Allscripts [partnered](#) to create a next-generation software.”

Additional research by Jim Boland and Christine Bahls.

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