

Passion for
improving healthcare

BEST IN
KLAS[®]



GLOBAL SOFTWARE

2024

Recognizing the software organizations that excelled in helping
healthcare professionals deliver better patient care



Delicate Arch—Grand County, Utah, United States

Celebrating the Meaningful Contributions of Healthcare Professionals



Over the years, my passion for improving healthcare has grown as I've come to understand just how deeply healthcare impacts our lives and the lives of those we love. I recently found myself in the ER supporting some family friends who were going through a tough situation. After watching a social worker assist the family, I pulled the worker aside and commented on how difficult her job seems. She responded, *"It sometimes is. But it's also really meaningful."*

The work of healthcare professionals is indeed meaningful, yet they face immense pressures ranging from financial strains to staffing shortages and the very real issue of clinician burnout. With these and other challenges in mind, KLAS has set out to serve healthcare providers like never before. We want to use our passion for improving healthcare to sustain those who may feel the challenges are too great to continue, and we want to provide actionable insights that will ultimately alleviate burdens and enhance clinician success.

The Best in KLAS report is the culmination of the countless insights we gather and the passionate work KLAS does. Often, KLAS is thanked by our customers for the work we do. But we are merely a conduit for the voice of providers and payers, channeling critical information into the industry so everyone can benefit.

This report wouldn't be possible without the vital voices of healthcare providers like you. Hearing about your experiences—and your patients' experiences—ensures we at KLAS aren't becoming complacent with our work. And when we share your feedback with the industry, thoughtful leaders can use it to cut through the noise and recenter on the issues that need to be tackled.

I can never thank you enough for your dedication and for allowing KLAS the privilege of being part of your journey toward making healthcare better. We recognize the meaningful work you're doing, and we intend to continue providing transparency that makes your job easier.

A handwritten signature in black ink that reads "Adam M. Gale". The signature is fluid and cursive.

Adam M. Gale
CEO & Co-Founder
KLAS Research

Understanding This Report

KLAS makes thousands of proactive calls each year to collect the research necessary for this report. In every instance, the KLAS methodology includes screening for bias to ensure as clean and random a sample as possible. To learn more about KLAS’ research process and methodology, please visit [our website](#).

Ranked Solutions

Ranking and overall performance score: For each market segment in this report, the software products eligible to compete for Best in KLAS are ranked by their overall performance score (100-point scale). These scores are based on customer responses to 16 numeric ratings questions and 4 yes/no questions, all weighted equally. Overall scores are calculated by averaging all evaluations collected for a given product over the last 13 months (December 1, 2022–December 31, 2023). Only one product from any given vendor may be eligible for Best in KLAS ranking within any given market segment. This product will always be the vendor’s most recent version. In instances where a vendor has multiple products of similar age (through acquisition, etc.), only the most comprehensive product (i.e., the product the vendor would lead with in the segment) is eligible.

Trend: Where available, trend data is included to indicate the percent by which a score has changed from the previous year’s Best in KLAS report. “N/A” in the trend column indicates that a product was not included in the previous Best in KLAS report or was not a ranked solution in that report.

Customer experience pillars: To enable readers to more quickly understand high-level differences in vendor performance, the questions from the KLAS evaluation are organized into six customer experience pillars—culture, loyalty, operations, product, relationship, and value, with vendors receiving a letter grade in each (see grading scale).

Customer Experience Pillars

Category	Culture	Loyalty	Operations	Product	Relationship	Value
Standard software evaluation metrics	Keeps all promises Proactive service Product works as promoted	Forecasted satisfaction Likely to recommend Overall satisfaction Part of long-term plans Would you buy again	Ease of use Quality of implementation Quality of training	Delivery of new technology Overall product quality Product has needed functionality Supports integration goals	Executive involvement Quality of phone/web support	Avoids charging for every little thing Drives tangible outcomes Money’s worth

Grading Scale for Customer Experience Pillars

	Software (100-point scale)
A+	95.0+
A	91.0–94.9
A-	88.0–90.9
B+	85.0–87.9
B	81.0–84.9
B-	78.0–80.9
C+	75.0–77.9
C	71.0–74.9
C-	68.0–70.9
D+	65.0–67.9
D	61.0–64.9
D-	58.0–60.9
F	<58.0

Solutions Not Ranked

Products in the categories below are not eligible for Best in KLAS ranking, though overall performance scores and customer experience pillar grades are still displayed.

- **Limited data (*)**: Solutions whose sample sizes do not meet KLAS' required thresholds for Best in KLAS ranking but do meet lower "limited data" thresholds. See "Sample Sizes" below for more details.
- **Newly rated [NR]**: Solutions that are newly rated. This status was achieved after the deadline for the Best in KLAS report.
- **Not eligible [NE]**: To be eligible for Best in KLAS ranking in regions outside the US, acute care EHR solutions must have evaluations from two or more countries within the region, and at least one customer in the region must be a HIMSS Level 6+ customer as confirmed by KLAS. PACS solutions outside the US must also have evaluations from two or more countries within the region, and at least one customer in the region must be using the PACS to manage 300,000+ images per year, demonstrating that the solution can scale for organizations with larger imaging needs.
- **Not primary [NP]**: Solutions that may still be purchased but are not a vendor's lead solution in a market segment. In some cases, these solutions may not be actively sold in the listed market segment.
- **Regional [R]**: Solutions for which the majority of data comes from organizations in a small, specific geographical area.

Sample Sizes

KLAS requires that the sample size for any given product reach certain thresholds before data can be reported.

Unique organizations: The sample sizes displayed throughout this report (e.g., n=16) represent the total number of *unique customer organizations* interviewed for a given solution. However, it should be noted that to allow for the representation of differing perspectives within any one customer organization, samples may include individuals from the same organization. Some respondents choose not to answer particular questions, meaning the sample size for any given question may be smaller than the overall sample.

Data thresholds for non-US regions: Within each region in KLAS' global research, sample sizes of 6 or more *unique organizations* are considered fully rated, and sample sizes of 3–5 *unique organizations* are marked as limited data. If the sample size is less than 3, no score is shown.

What's New in Best in KLAS?

New/Retired Market Segments

In an ongoing effort to measure vendor performance in the areas of most interest to healthcare providers around the globe, the following market segments have been updated, added to, or retired from the Global Best in KLAS report:

Updated market segments:

- Shared Care Records/HIE was previously called Clinical Portals

New market segments:

- Acute Care EHR (Europe) has been broken into five subregions:
 - DACH: Data comes from organizations in Austria, Germany, and Switzerland
 - France
 - Northern Europe: Data comes from organizations in Belgium, Denmark, Faroe Islands, Luxembourg, the Netherlands, and Sweden
 - Southern Europe: Data comes from organizations in Andorra, Italy, and Spain
 - UK/Ireland
- PACS (Europe) has been broken into five subregions:
 - DACH: Data comes from organizations in Austria, Germany, and Switzerland
 - Eastern Europe: Data comes from organizations in Hungary, Lithuania, and Russia
 - Northern Europe: Data comes from organizations in Belgium, Denmark, Faroe Islands, Iceland, the Netherlands, Norway, and Sweden
 - Southern Europe: Data comes from organizations in Andorra, Croatia, Israel, Italy, Portugal, and Spain
 - UK/Ireland

Retired market segments:

- Video Conferencing Platforms

For recently published reports, visit
klasresearch.com/reports



KLAS Advisory Board

The KLAS Advisory Board, comprised of some of the best and brightest in healthcare, guides our efforts to measure and improve the world's healthcare technology. This group of dedicated leaders exemplify the very best healthcare has to offer.

International Advisory Board



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King Faisal Specialist Hospital & Research
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Tamara Sunbul,
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Medical Director of Clinical Informatics
Johns Hopkins Aramco Healthcare
Saudi Arabia



Gürhan Zincircioglu,
MD, MSc, FHIMSS

CMIO
Tire Devlet Hastanesi
Turkey

***"The efforts of this board have had a deep impact on the direction of KLAS.
Thank you all for your guidance throughout the years."***

—Adam M. Gale, CEO & Co-Founder, KLAS Research

Emeritus Advisory Board

Thank you to our departing member:



Adrian Byrne

Former CIO
University Hospital Southampton NHS
Foundation Trust
United Kingdom

"Adrian 'Ade' Byrne has been one of the brightest and most impactful digital leaders in the UK and has won many awards over the years. He graciously advised KLAS on our UK strategy and contributed as a thought leader in various KLAS events in both the US and Europe. Ade pioneered the KLAS Arch Collaborative measurement at Southampton as one of the first UK trusts to measure the clinician EPR experience. KLAS is grateful for Adrian's contributions during his more than five years on our International Advisory Board. We congratulate him on his recent retirement and wish him luck in his continued endeavors." —Jeremy Goff, VP of Emerging Business, KLAS Research

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Sharing Your Experience Matters

Contribute to healthcare's success

Give a little feedback on the tools you're using and get a lot of insights in return via free access to KLAS ratings, commentary, and market trends.

- See how healthcare IT vendors compare
- Find ratings on vendor performance
- Read real commentary from your peers

Speak up and share your experiences!
We can't change healthcare without you.



Thanks to providers who share their experience, KLAS data . . .



DRAWS FROM

26,000+

evaluations from healthcare professionals worldwide

REPRESENTS

5,000+

healthcare organizations across the globe

MEASURES

1,100+

healthcare technology products and services



"I am happy to help KLAS. I really enjoy having the opportunity to be asked what I personally think given my level because I really have no authority, but to be quite honest, I know more about the application than just about anybody. Also, it is important for the vendor to truly understand what we think, what we believe, and what we feel about them because I never want anybody to think that we would be hypocritical in our conversation with them or that what we say to their face and their back wouldn't be consistent. We praise [the vendor] highly, and I am glad that they will be able to see the results of my conversation with KLAS." —Analyst/coordinator, large acute care facility

Share your voice:
klasresearch.com/evaluation



Introduction

2

Executive Insights

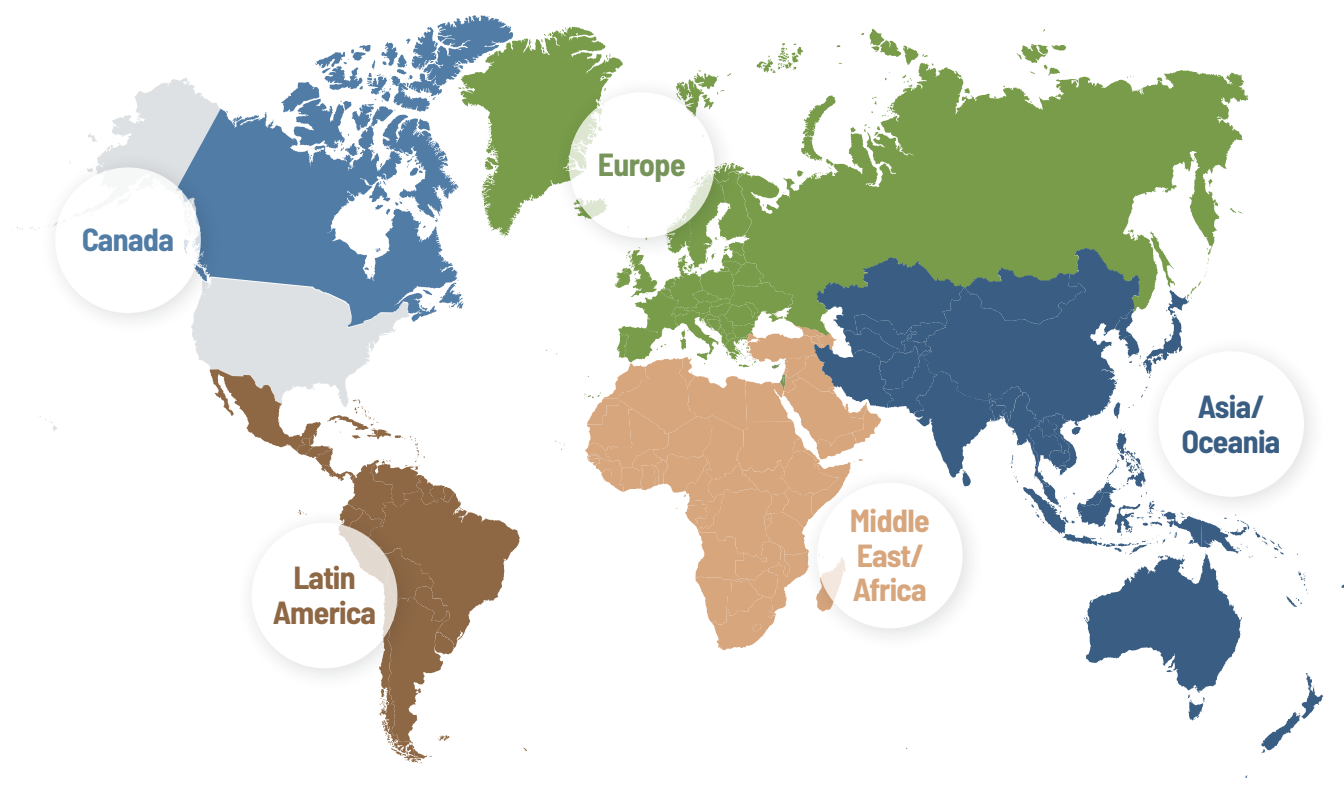
4

2024 Best in KLAS Awards

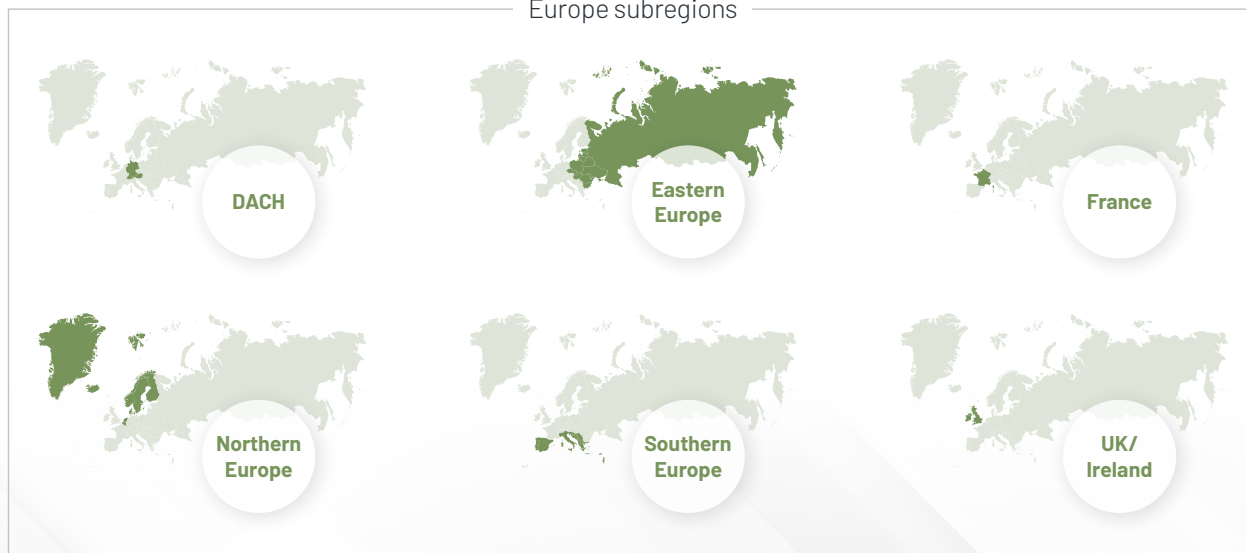
Executive Insights

The Global Best in KLAS report examines the performance of multinational healthcare information technology (HIT) products and vendors in regions outside the United States, including Asia/Oceania, Canada, Europe, Latin America, and the Middle East/Africa. Country-specific and custom solutions are not included in the data

Regional Breakout



Europe subregions



Key Learnings from 2023

1 Patient Engagement Gains Energy

Better engaging with patients throughout their healthcare journey is a top priority for healthcare organizations around the globe; nearly two-thirds of organizations interviewed by KLAS worldwide report that patient engagement technology is a high priority for IT investment in the next one to two years. Many are already leveraging patient engagement technologies to some degree, with a focus in coming years on consolidating functionalities through the patient portal and broadening and simplifying patient access to healthcare services. For detailed insights, see KLAS' upcoming Global Patient Engagement 2024 report.

2 EHR Optimization and Expansion a Continued Priority

Around the world, healthcare organizations continue to focus their IT investment efforts on optimizing their existing technologies, particularly the EHR. This includes improving adoption and usability for end users across clinical areas as well as leveraging more data-driven capabilities from EHR vendors to further optimize operations. In 2024, KLAS will publish two reports, focused on the Middle East/Africa and the UK/Ireland, that examine the adoption and performance of EHR vendors' broader portfolios.

3 Healthcare Organizations Push toward the Cloud

In tandem with EHR optimization efforts, many healthcare organizations are looking to modernize and lighten their IT infrastructure, with more and more looking to the cloud. While cloud adoption is still early, plans are becoming more concrete; over two-thirds of organizations interviewed by KLAS report being in at least the early stages of cloud adoption. Additionally, cloud strategy and transformation is the area in which healthcare organizations most frequently report plans to engage a services firm for advisory work. Updated insights on investment initiatives and cloud adoption will be published in KLAS' upcoming Global Healthcare IT Trends 2024 report.

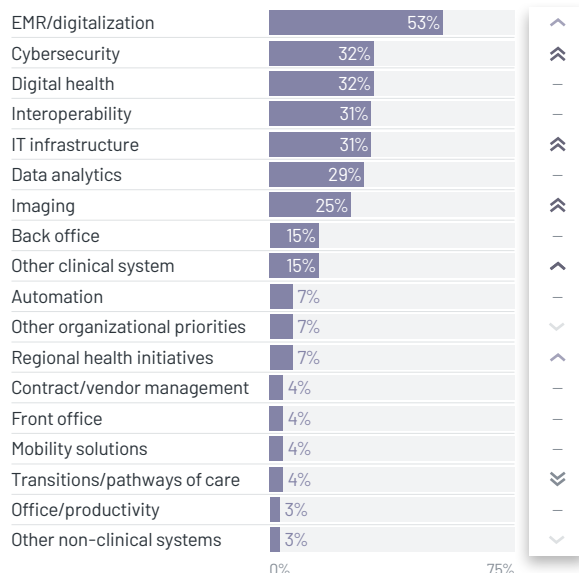
Global Healthcare IT Investment Priorities

Respondents could select more than one answer (n=181)

Priority level trend, 2019 vs. 2022

Percentage point change since 2019

- ⬆ >10 point increase
- ⬆ 5-10 point increase
- ⬆ 5-10 point decrease
- ⬆ >10 point decrease
- 0-4 point increase or decrease



Priority areas above include the following project types:

EMR/digitalization: EMR selection, implementation, continued rollout, optimization, document management

Digital health: Patient engagement, remote patient monitoring, telemedicine

Cybersecurity: Firewalls, endpoint protection, identity access management, mobile device management

IT infrastructure: Servers/storage, system updates, workstations/laptops, planning for the cloud

Data analytics: AI, BI, enterprise data warehouse

Imaging: PACS/RIS, universal viewer, VNA

Back office: Enterprise resource planning, HR, workforce management

Other clinical system: Barcoding, bedside monitors, clinical decision support, ePrescribing, departmental solutions (ED, lab information system, maternity, oncology)

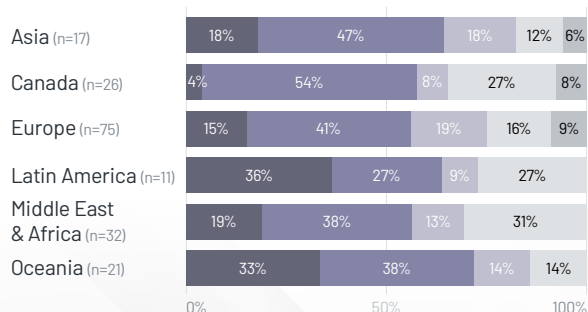
Automation: Robotic process automation

Other organizational priorities: New physical building, burnout initiatives, etc.

Organization Cloud Status—by Region

- Already leveraging—mature
- Already leveraging—early
- Planning stages
- No concrete plans yet
- Not on road map

Note: Due to rounding, some bars may not add to 100%.



Note: Charts are from KLAS' [Global \(Non-US\) Healthcare IT Trends 2023](#) report.



The Best in KLAS award is given to vendors in recognition of their outstanding efforts to help healthcare professionals deliver better patient care. Global awards are given in the following software market segments: (1) acute care EHR, (2) digital pathology, (3) PACS, and (4) shared care records/HIE.

Acute Care EHR

Asia/Oceania

IQVIA Arcus Air HIS **82.7**

Canada

Epic EpicCare Inpatient EHR **87.5**

Europe

DACH

Dedalus ORBIS **67.8**

France

Softway Medical HOPITAL MANAGER **77.6**

Northern Europe

Epic EpicCare Inpatient EHR **84.0**

Southern Europe

Dedalus Care (HCIS) (Mostly Spain) **79.7**

UK/Ireland

Epic EpicCare Inpatient EHR **85.0**

Latin America

MV SOUL (Mostly Brazil) **79.9**

Middle East/Africa

Oracle Health Millennium PowerChart **82.5**

Digital Pathology

Europe

TRIBUN Health CaloPix **90.2**

PACS

Asia/Oceania

Fujifilm Synapse **92.8**

Canada

Sectra PACS **94.6**

Europe

DACH

VISUS JiveX **86.9**

Northern Europe

Sectra PACS **83.7**

Southern Europe

Sectra PACS **93.5**

UK/Ireland

Intelerad InSight PACS (Insignia) **88.2**

Latin America

Pixeon PACS Aurora (Mostly Brazil) **87.9**

Middle East/Africa

AGFA HealthCare Enterprise Imaging for Radiology **88.4**

Shared Care Records/HIE

Europe

InterSystems HealthShare Unified Care Record **83.5**

There Is a Way to Improve the EHR Experience

Does the thought of improving your clinicians' EHR experience feel daunting or hopeless? KLAS can help.

KLAS' Arch Collaborative is a group of healthcare organizations committed to improving the EHR experience. KLAS works with each Arch Collaborative member to transform their EHR experience by uncovering opportunities for improvement through standardized surveys and benchmarking.

Partner with the Arch Collaborative to:



Achieve cost savings

Learn how to optimize your EHR system and save on operational costs.



Reduce burnout

Prioritize your staff's well-being by improving their EHR experience and reducing risk of burnout.



Decrease staff turnover

Enhance job satisfaction and staff retention by creating a supportive EHR environment.



Access collective wisdom from your peers in the Arch Collaborative Provider Guidebook:
klasresearch.com/archcollaborative/report/arch-collaborative-provider-guidebook-2023/536

Healthcare IT companies can participate as well!

Use Arch Collaborative findings to give your solutions the edge they need to excel and dramatically reduce the time it takes to implement changes based on end-user feedback.



"We are truly grateful for the collective research KLAS' Arch Collaborative has given to the industry, as this allows us all to stay focused on revolutionizing patient care."
—Vendor Arch Collaborative member



"The KLAS Arch Collaborative provides a welcoming space for vendors and health systems to put aside their differences and competitiveness and work together to improve patient care." —Vendor Arch Collaborative member

Learn more at
klasresearch.com/arch-collaborative



Arch Collaborative

Arch Collaborative Members

Note: All listed organizations consented to publicly sharing their names as Arch Collaborative members.

For a list of vendor participants, visit
klasresearch.com/arch-collaborative



ACT Health
Adventist Health
Advocate Aurora Health
Akron Children's Hospital
Alliance of Chicago Community Health Services
Allina Health
Amsterdam UMC
Anderson Hospital
Arkansas Children's Hospital
Asante
Aspirus Health
Aster DM Healthcare
Azienda Ospedaliera Nazionale SS. Antonio e Biagio e Cesare Arrigo
Baptist Health
Baptist Memorial Health Care Corporation
Bassett Healthcare Network
Baylor Scott & White Health
Bendigo Health
Benefis Health System
Billings Clinic
Birmingham and Solihull Mental Health NHS Foundation Trust
Boston Children's Hospital
Breakwater Health Network
Cabell Huntington Hospital
Capital Region Health Care
Carilion Clinic
Carle Health
CarolinaEast Physicians
CaroMont Health
Catholic Health
CentraCare
Centra Health
Children's Hospital of East Ontario (CHEO)
Children's Hospital of Orange County (CHOC)
Children's Mercy Hospital
Children's Minnesota
Children's Nebraska
The Christ Hospital
City of Hope Felford Clinical Research Hospital
CommonSpirit Health
Community Health Access Network
Community Health Access Network (CHAN)
Community Health Network
Compass Medical, PC
Cone Health
Confluence Health
Connecticut Children's Medical Center
Cook County Health
Corewell Health
Cottage Health
CoxHealth
Dayton Children's Hospital
Dignity Health
Door County Medical Center
Duke Health
ECU Health
eHealth NSW
El Camino Health
Elliot Health
Essentia Health
Fairview Health Services
FHN Memorial Hospital
Frances Mahon Deaconess Hospital
Frederick Health
The Froedtert & the Medical College of Wisconsin
The Galway Clinic
Garnet Health
Geisinger Health
Genesis Healthcare System
Genesis Health System

Gillette Children's
Glens Falls Hospital
Good Samaritan Hospital
Grand View Hospital
The Guthrie Clinic
Harbin Clinic
Hawaii Primary Care Association
Health Choice Network
Health Federation of Philadelphia
Hennepin County Medical Center
Henry Ford Health
HonorHealth
The Hospital for Sick Children (SickKids)
Hospital for Special Surgery (HSS)
Hospital Sisters Health System (HSBS)
Hunterdon Medical Center
INConcertCare
Indiana Primary Health Care Association
Indiana Regional Medical Center
Inova
Intermountain Health
Island Hospital
IU Health
Jefferson Health
John Muir Health
JPS Health Network
Kaiser Permanente Northwest
Kettering Health
King Faisal Specialist Hospital & Research Centre
Legacy Health
Lehigh Valley Health Network
L'Hôpital d'Ottawa
Luminis Health Anne Arundel Medical Center
Mackenzie Health
MaineHealth
Marshfield Clinic Health System
Massachusetts League of Community Health Centers
Mediclinic Middle East
MemorialCare
Memorial Health System
Mercy Health
Meritus Health
Methodist Le Bonheur Healthcare
MetroHealth System
Michigan Medicine
Monument Health
Morris Hospital & Healthcare Centers
Mount Nittany Medical Center
Mount Sinai Health System
MultiCare Health System
Munson Healthcare
MUSC Health
Nebraska Medicine
New England Quality Care Alliance
Northern Light Health
North Memorial Health
North Mississippi Health Services
Northshore-Edward-Elmhurst Health
NorthShore University HealthSystem
Northwestern Medical Center
Novant Health
Nuvance Health
NYU Langone Health
OCHIN
Ochsner Health
Ohio State University Health System
OrthoVirginia
Osceola Medical Center
OU Health
Ozarks Healthcare
Parkville Precinct Medical
PeaceHealth

Penn Medicine
Petaluma Health Center
Piedmont Healthcare
ProHealth Care
Providence
The Queen's Health System
Rady Children's Hospital San Diego
Renown Health
Rochester Regional Health
Roswell Park Comprehensive Cancer Center
Rotherham General Hospital
The Royal Children's Hospital Melbourne
Rush University Medical Center
San Luis Valley Health
Santa Clara Valley Healthcare
Seattle Children's Hospital
Sharp HealthCare
Sheikh Khalifa Hospital - Masfoot
Skyline Medical Practice
Southern California Permanente Medical Group
Southern Illinois Healthcare
SSM Health
St. Charles Health System
St. Joseph's Healthcare Hamilton
St. Luke's University Health Network
St. Luke's Boise Medical Center
StrideCare
Sturdy Memorial Hospital
Summit Healthcare Regional Medical Center
Summit Health (NJ Urology)
SUNY Upstate Medical University
Sutter Health
Sydney Local Health District
Texas Tech University Health Sciences Center El Paso
ThedaCare
TidalHealth Peninsula Regional
Tower Health
Trillium Health Partners
Trinity Health
Tufts Medical Center
UC Davis Health
UCLA Health
UC San Diego Health
UMass Memorial Health
UNC Health
University Health Network
University Hospitals of Morecambe Bay NHS Foundation Trust
University of Illinois Hospital & Health Sciences System
University of Kansas Health System
University of Mississippi University Hospital
University of Missouri Health Care
University of Texas MD Anderson Cancer Center
University of Texas Medical Branch
University of Toledo Medical Center
University of Vermont Health Network
UT Southwestern Medical Center
UVA Health
UW Health
UW Medicine
Valley Children's Healthcare
Valley Health System
Valley View Hospital
VCU Health
Vermont Rural Health Alliance
Virtua Health
WakeMed
Wasatch Pediatrics
WellSpan Health
Wellstar Health System
Women's College Hospital
WVU Medicine
Yuma Regional Medical Center

...and more!

Global Software Rankings

10 Acute Care EHR

Asia/Oceania
Canada
Europe
DACH
France
Northern Europe
Southern Europe
UK/Ireland
Latin America
Middle East/Africa

21 Digital Pathology

Europe

22 PACS

Asia/Oceania
Canada
Europe
DACH
Eastern Europe
Northern Europe
Southern Europe
UK/Ireland
Latin America
Middle East/Africa

32 Shared Care Records/HIE

Canada
Europe
Latin America

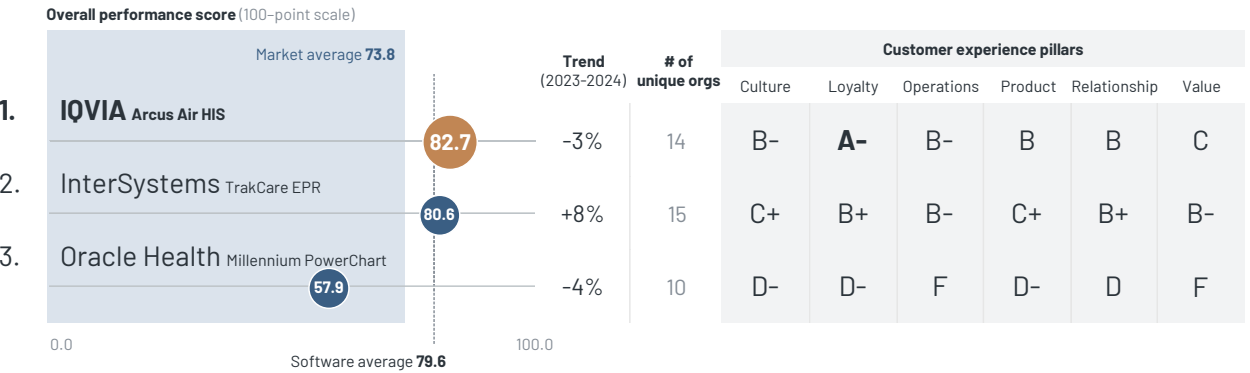
Acute Care EHR Asia/Oceania

Segment definitions can be found on page 36.



Ranked Solutions

Grading methodology can be found on page ii.



Solutions Not Ranked

Ordered alphabetically

	Overall performance score (100-point scale)	# of unique orgs	Customer experience pillars					
			Culture	Loyalty	Operations	Product	Relationship	Value
Altera Digital Health Sunrise Acute Care	46.0*	3	F*	F*	F*	F*	F*	F*
Epic EpicCare Inpatient EHR	84.3*	5	B+*	B+*	B*	B*	B*	B-*
Telstra Health Kyra Clinical (Australia Only)	70.5*	4	D+*	C*	C-*	D+*	C*	B-*

*Limited data

Definitions can be found on page iii.

Other Notable Performances

Ranked solutions for which at least 95% of respondents answered yes.

Avoids charging for every little thing?

None

Keeps all promises?

None

Part of long-term plans?

IQVIA Arcus Air HIS	n=14	100%
InterSystems TrakCare EPR	n=15	96%

Would you buy again?

IQVIA Arcus Air HIS	n=13	100%
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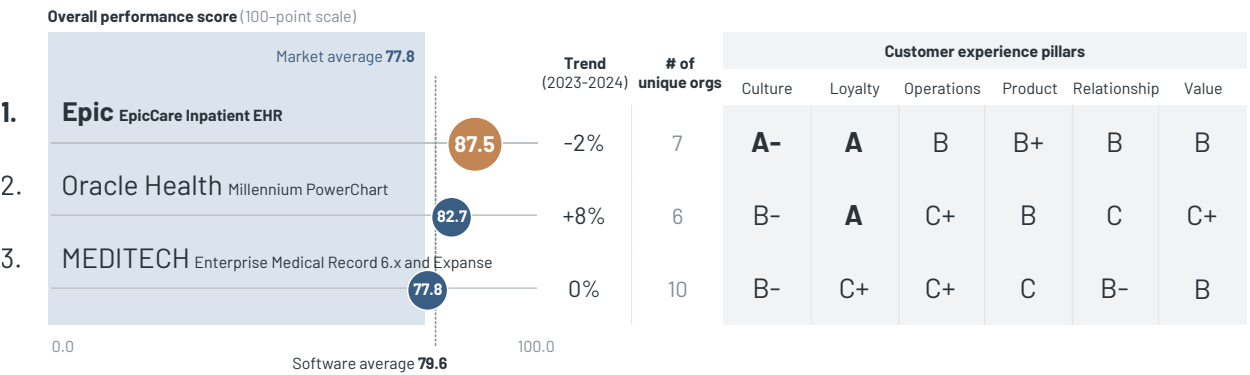
Acute Care EHR Canada

Segment definitions can be found on page 36.



Ranked Solutions

Grading methodology can be found on page ii.



Solutions Not Ranked

	Overall performance score (100-point scale)	# of unique orgs	Customer experience pillars					
			Culture	Loyalty	Operations	Product	Relationship	Value
Altera Digital Health Sunrise Acute Care	63.6*	3	F*	D*	D+*	C-*	C*	F*

*Limited data

Definitions can be found on page iii.

Other Notable Performances

Ranked solutions for which at least 95% of respondents answered yes.

Avoids charging for every little thing?	Keeps all promises?	Part of long-term plans?	Would you buy again?
None	Epic EpicCare Inpatient EHR n=6 100%	Epic EpicCare Inpatient EHR n=7 100%	Epic EpicCare Inpatient EHR n=7 100%
		Oracle Health Millennium PowerChart n=6 100%	Oracle Health Millennium PowerChart n=6 100%



Recent Insights



Canada EMR Consulting Services 2023

Which Firms Drive Success throughout the EMR Life Cycle?

Key Findings:

1. Seasoned Firms Healthtech, Deloitte Offer Widest Breadth and Highest Number of Validated Engagements; Client Satisfaction with Experience Varies for Both Firms
2. Limited Data: To Drive Strategic Engagements, Tectonic Leverages Understanding of Canadian Market, Impact Advisors Seeks Deep Understanding of Clients
3. Limited Data: Tegria Provides Strong Resources, though Overall Client Satisfaction Is Mixed; Medix Exceeds Client Expectations Thanks to Intentionally Selected Resources

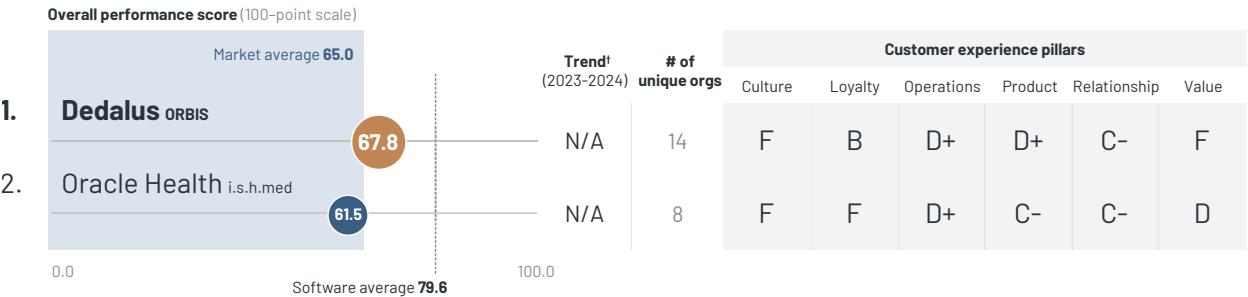
Acute Care EHR DACH

Segment definitions can be found on page 36.



Ranked Solutions

Grading methodology can be found on page ii.



† Score trends are not available as the Acute Care EHR Europe segment has been newly broken out into different European subregions.

Solutions Not Ranked

Ordered alphabetically

	Overall performance score (100-point scale)	# of unique orgs	Customer experience pillars					
			Culture	Loyalty	Operations	Product	Relationship	Value
CompuGroup Medical medico	67.4*	4	D*	C-*	C*	D*	C+*	D+*
Deutsche Telekom Clinical Solutions iMedOne	73.1*	3	B-*	C-*	C+*	C*	D*	B*
Mesalvo ClinicCentre [NR]	67.2*	3	F*	B*	D*	D*	-	B-*
Mesalvo Meona [NR]	55.0	7	F	C	D	F	D-	F

*Limited data - Insufficient data [NR] Newly rated

Definitions can be found on page iii.

Other Notable Performances

Ranked solutions for which at least 95% of respondents answered yes.

Avoids charging for every little thing?	Keeps all promises?	Part of long-term plans?	Would you buy again?
None	None	Dedalus ORBIS n=14 100%	None

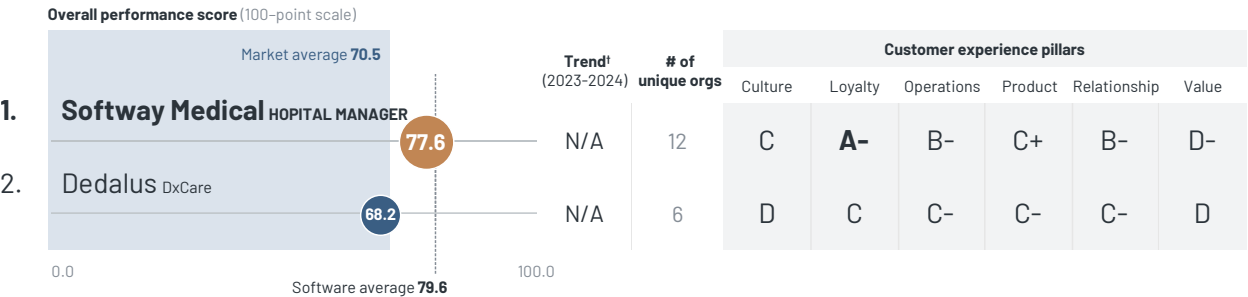
Acute Care EHR France

Segment definitions can be found on page 36.



Ranked Solutions

Grading methodology can be found on page ii.



† Score trends are not available as the Acute Care EHR Europe segment has been newly broken out into different European subregions.

Solutions Not Ranked

	Overall performance score (100-point scale)	# of unique orgs	Customer experience pillars					
			Culture	Loyalty	Operations	Product	Relationship	Value
InterSystems TrakCare EPR	64.0*	4	D-*	D+*	D-*	D+*	C*	D*

*Limited data

Definitions can be found on page iii.

Other Notable Performances

Ranked solutions for which at least 95% of respondents answered yes.

Avoids charging for every little thing?	Keeps all promises?	Part of long-term plans?	Would you buy again?
None	None	Softway Medical HOPITAL MANAGER n=12 100%	None

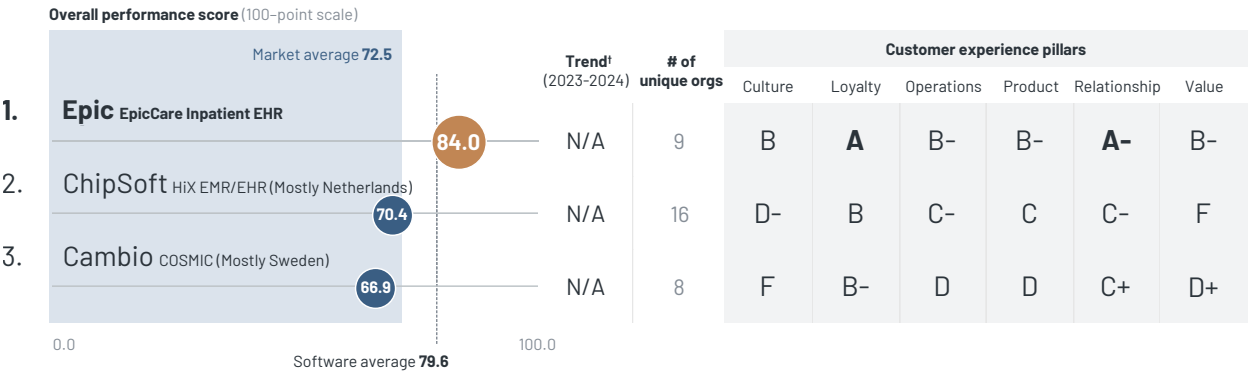
Acute Care EHR Northern Europe

Segment definitions can be found on page 36.



Ranked Solutions

Grading methodology can be found on page ii.



† Score trends are not available as the Acute Care EHR Europe segment has been newly broken out into different European subregions.

Other Notable Performances

Ranked solutions for which at least 95% of respondents answered yes.

Avoids charging for every little thing?	Keeps all promises?	Part of long-term plans?	Would you buy again?
None	None	Epic EpicCare Inpatient EHR n=8 100%	Epic EpicCare Inpatient EHR n=8 100%

Acute Care EHR Southern Europe

Segment definitions can be found on page 36.



Ranked Solutions

Grading methodology can be found on page ii.



† Score trends are not available as the Acute Care EHR Europe segment has been newly broken out into different European subregions.

Other Notable Performances

Ranked solutions for which at least 95% of respondents answered yes.

Avoids charging for every little thing?		Keeps all promises?		Part of long-term plans?		Would you buy again?	
None		None		Dedalus Care (HCIS) (Mostly Spain)	n=6 100%	Dedalus Care (HCIS) (Mostly Spain)	n=6 100%
				InterSystems TrakCare EPR	n=7 100%		

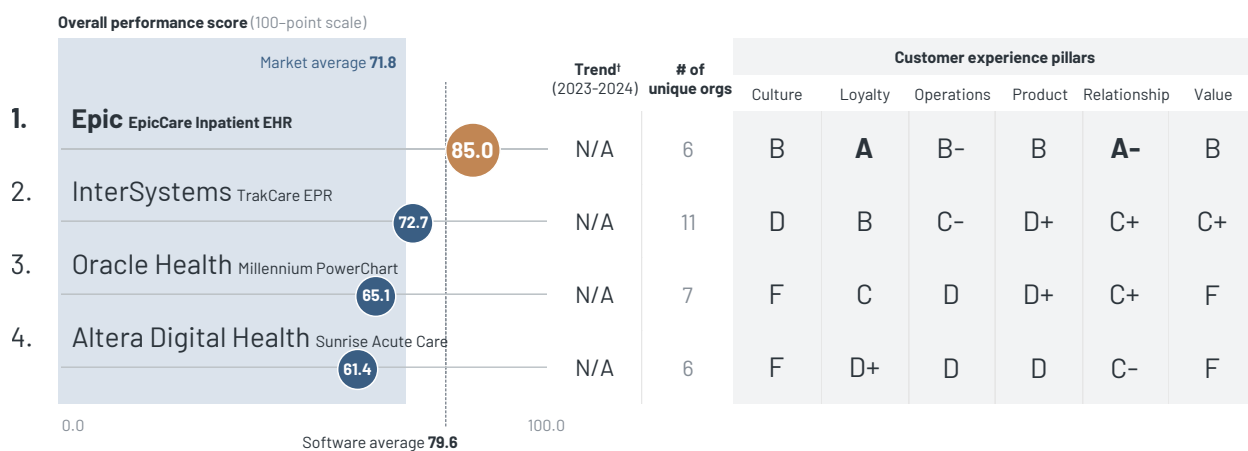
Acute Care EHR UK/Ireland

Segment definitions can be found on page 36.



Ranked Solutions

Grading methodology can be found on page ii.



† Score trends are not available as the Acute Care EHR Europe segment has been newly broken out into different European subregions.

Solutions Not Ranked

Ordered alphabetically

	Overall performance score (100-point scale)	# of unique orgs	Customer experience pillars					
			Culture	Loyalty	Operations	Product	Relationship	Value
Dedalus Lorenzo [NP]	66.2*	3	C-*	D-*	D+*	D*	C+*	C-*
MEDITECH Enterprise Medical Record 6.x and Expanse	89.6*	3	A-*	A*	B*	B+*	A*	A*

*Limited data [NP] Not primary

Definitions can be found on page iii.

Other Notable Performances

Ranked solutions for which at least 95% of respondents answered yes.

Avoids charging for every little thing?

None

Keeps all promises?

None

Part of long-term plans?

Epic EpicCare Inpatient EHR n=6 **100%**InterSystems TrakCare EPR n=11 **100%**Oracle Health Millennium PowerChart n=7 **100%**

Would you buy again?

Epic EpicCare Inpatient EHR n=6 **100%**

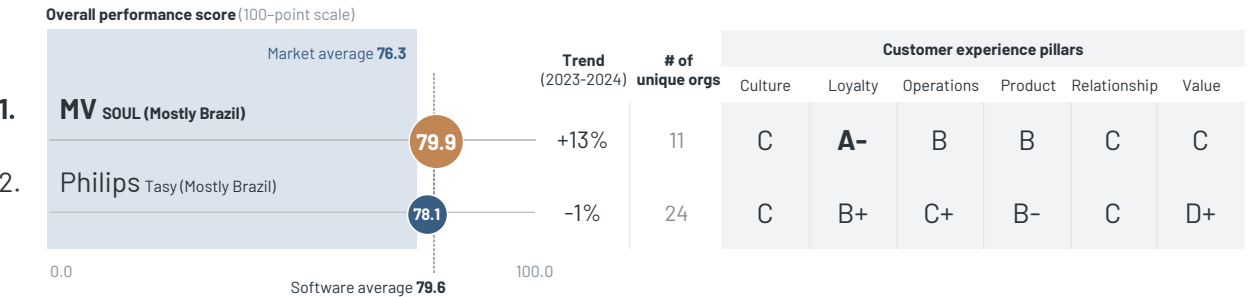
Acute Care EHR Latin America

Segment definitions can be found on page 36.



Ranked Solutions

Grading methodology can be found on page ii.



Solutions Not Ranked

Ordered alphabetically

	Overall performance score (100-point scale)	# of unique orgs	Customer experience pillars					
			Culture	Loyalty	Operations	Product	Relationship	Value
Dedalus MedView (Brazil Only) [NE]	58.4	6	F	F	C	F	C	F
InterSystems TrakCare EPR [NE]	79.8	9	C	B+	C+	B-	B-	C
NTT DATA ehCOS Clinic	60.2*	3	F*	F*	C-*	C*	C-*	F*
Oracle Health i.s.h.med	56.2*	4	F*	F*	D*	D-*	B+*	F*
Oracle Health Millennium PowerChart	67.8*	3	F*	B*	D*	C*	C*	F*
Pixeon SmartHealth (Brazil Only) [NE]	77.0	12	C	B-	C	B-	C	C+

*Limited data [NE] Not eligible

Definitions can be found on page iii.

Other Notable Performances

Ranked solutions for which at least 95% of respondents answered yes.

Avoids charging for every little thing?	Keeps all promises?	Part of long-term plans?	Would you buy again?
None	None	MV SOUL (Mostly Brazil) n=11 100%	None

Acute Care EHR Middle East/Africa

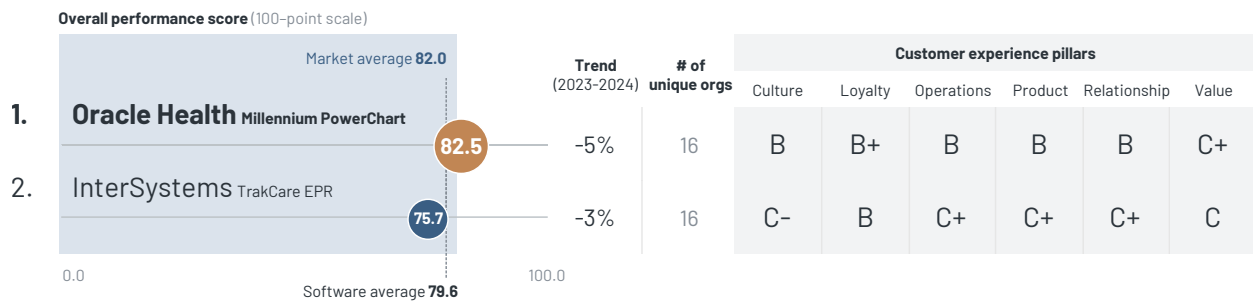
Segment definitions can be found on page 36.



ORACLE Health

Ranked Solutions

Grading methodology can be found on page ii.



Solutions Not Ranked

Ordered alphabetically

	Overall performance score (100-point scale)	# of unique orgs	Customer experience pillars					
			Culture	Loyalty	Operations	Product	Relationship	Value
Cloud Solutions VIDA (Mostly Saudi Arabia)	87.7*	5	B*	A+*	B+*	B*	A*	A-*
Dedalus Enterprise Management	82.6*	3	B*	A-*	C+*	B*	B*	C+*
Epic EpicCare Inpatient EHR	90.9*	5	A*	A+*	A-*	B+*	A-*	B+*
ezCaretech BESTCare 2.0	78.6*	3	B+*	C+*	B+*	C+*	B*	C-*
Health Insights MEDICACLOUDCARE [NE]	86.9	13	B	A	B	B+	A-	B-
IQVIA Arcus Air HIS	81.7*	5	B*	B*	B*	B-*	B*	C+*

*Limited data [NE] Not eligible

Definitions can be found on page iii.

Other Notable Performances

Ranked solutions for which at least 95% of respondents answered yes.

Avoids charging for every little thing?

None

Keeps all promises?

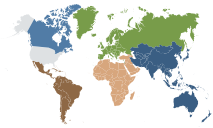
None

Part of long-term plans?

InterSystems TrakCare n=16 **100%**Oracle Health Millennium PowerChart n=16 **95%**

Would you buy again?

None



Recent Insights—Acute Care EHR



Global (Non-US) EMR Benefits 2023

What Benefits Can You Expect from Your EMR?

Key Findings:

1. Improving Patient Care Often the Core Driver of EMR Implementations
2. Staff Efficiency and Other Operational Benefits Frequently Achieved, though More Often Fall Below Expectations
3. What Can Organizations Do to Achieve More Benefits from an EMR Implementation?
 - a. Have a Strong Plan and Vision in Place before Beginning the Implementation
 - b. Work Closely with Your Vendor Partner
3. How Quickly Can Organizations Expect to See Outcomes?
4. What Unexpected EMR Costs Should Organizations Prepare For?



Global (Non-US) EMR Market Share 2023

Europe Continues to Lead, Energy Picking Up in Other Regions

Key Findings:

1. Dedalus, Oracle Health (Cerner), IQVIA Lead Multiregional Vendors in 2022 Wins
2. Softway Medical Leads a Strong Year for Regional Vendors, Followed by CGM & System C in Europe, MV & Philips in Latin America
3. Europe: Regional Decisions Bolster Softway Medical, Dedalus & CGM
4. Latin America: MV Leads in Brazil Decisions, Followed by Philips; NTT DATA Selected in Argentina
5. Middle East/Africa: Oracle Health (Cerner) Selections Boost Already Strong Presence, Dedalus Selected in Morocco
6. Asia/Oceania: IQVIA, InterSystems, ezCaretech Most Widely Selected as EMR Activity Rebounds
7. Canada: Oracle Health (Cerner) Selected in the Only 2022 Hospital EMR Decision

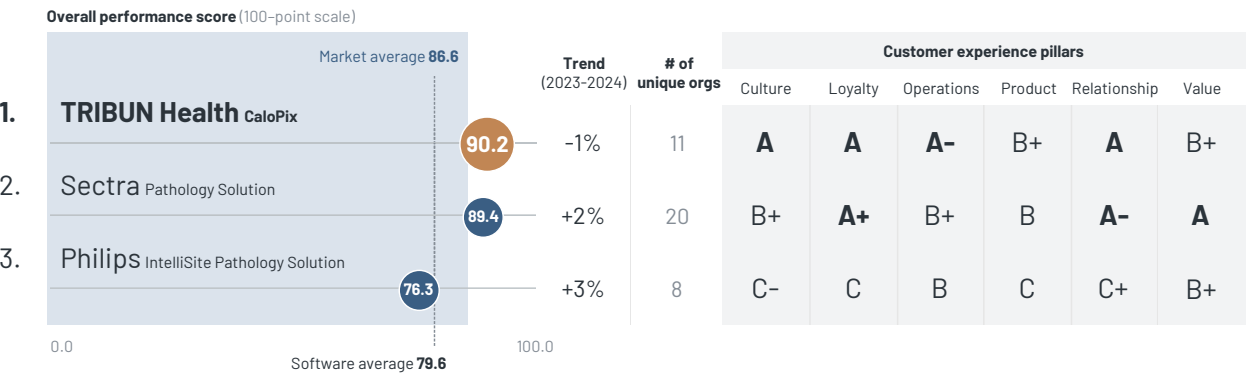
Digital Pathology Europe

Segment definitions can be found on page 36.



Ranked Solutions

Grading methodology can be found on page ii.



Solutions Not Ranked

	Overall performance score (100-point scale)	# of unique orgs	Customer experience pillars					
			Culture	Loyalty	Operations	Product	Relationship	Value
Proscia Concentriq [NR]	89.4*	3	A-*	A*	A-*	B+*	A-*	B*

*Limited data [NR] Newly rated

Definitions can be found on page iii.

Other Notable Performances

Ranked solutions for which at least 95% of respondents answered yes.

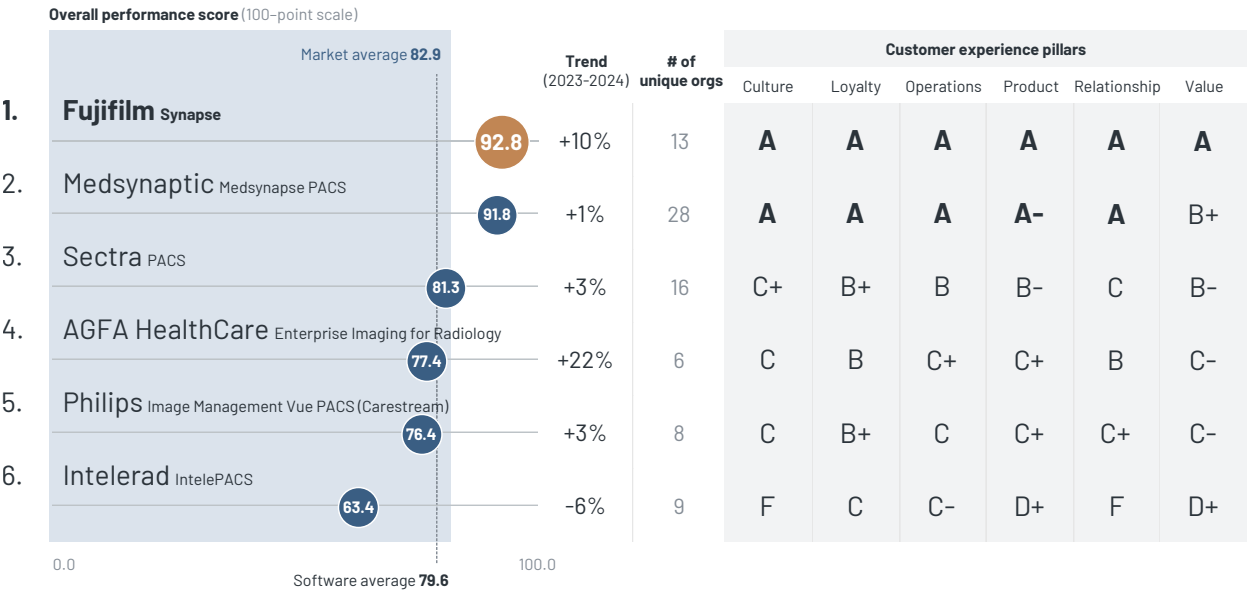
*Limited data

Avoids charging for every little thing?			Keeps all promises?			Part of long-term plans?			Would you buy again?		
Philips IntelliSite Pathology Solution	n=5	100%*	TRIBUN Health CaloPix	n=9	100%	Philips IntelliSite Pathology Solution	n=5	100%*	Sectra Pathology Solution	n=19	100%
Sectra Pathology Solution	n=16	95%				Sectra Pathology Solution	n=20	100%	TRIBUN Health CaloPix	n=10	100%
						TRIBUN Health CaloPix	n=11	100%			



Ranked Solutions

Grading methodology can be found on page ii.



Solutions Not Ranked

	Overall performance score (100-point scale)	# of unique orgs	Customer experience pillars					
			Culture	Loyalty	Operations	Product	Relationship	Value
INFINITT PACS	78.5*	3	B*	B*	C+*	C*	-	B*

*Limited data - Insufficient data

Definitions can be found on page iii.

Other Notable Performances

Ranked solutions for which at least 95% of respondents answered yes.

Avoids charging for every little thing?	Keeps all promises?	Part of long-term plans?	Would you buy again?
None	Medsynaptic Medsynapse PACS n=28 97%	Fujifilm Synapse n=13 100%	Philips Image Management Vue PACS (Carestream) n=7 100%
		Intelera InteleraPACS n=9 100%	Sectra PACS n=16 95%
		Medsynaptic Medsynapse PACS n=28 100%	
		Philips Image Management Vue PACS (Carestream) n=8 100%	
		Sectra PACS n=16 100%	



SECTRA

Knowledge and passion

Ranked Solutions

Grading methodology can be found on page ii.



Solutions Not Ranked

Ordered alphabetically

	Overall performance score (100-point scale)	# of unique orgs	Customer experience pillars					
			Culture	Loyalty	Operations	Product	Relationship	Value
AGFA HealthCare IMPAX [NP]	63.4	11	C-	F	C-	D+	D	D-
Change Healthcare Radiology Solutions	83.1*	4	B*	A-*	B+*	B-*	C+*	C+*

*Limited data [NP] Not primary

Definitions can be found on page iii.

Other Notable Performances

Ranked solutions for which at least 95% of respondents answered yes.

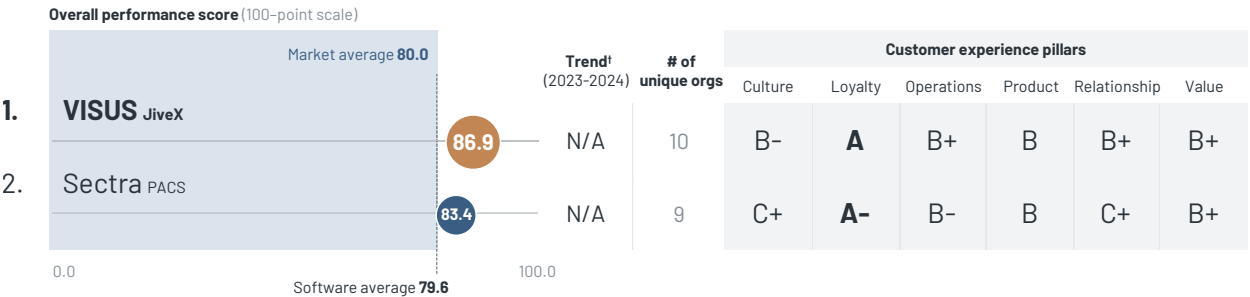
Avoids charging for every little thing?	Keeps all promises?	Part of long-term plans?	Would you buy again?
None	Sectra PACS n=7 100%	AGFA HealthCare Enterprise Imaging for Radiology n=7 100%	Sectra PACS n=7 100%
		Sectra PACS n=7 100%	

Segment definitions can be found on page 36.



Ranked Solutions

Grading methodology can be found on page ii.



† Score trends are not available as the PACS Europe segment has been newly broken out into different European subregions.

Solutions Not Ranked

	Overall performance score (100-point scale)	# of unique orgs	Customer experience pillars					
			Culture	Loyalty	Operations	Product	Relationship	Value
Dedalus DeepUnity [NR]	79.3*	4	C-*	A*	B*	B-*	C+*	D*

*Limited data [NR] Newly rated

Definitions can be found on page iii.

Other Notable Performances

Ranked solutions for which at least 95% of respondents answered yes.

Avoids charging for every little thing?			Keeps all promises?			Part of long-term plans?			Would you buy again?		
Sectra PACS	n=9	100%	None			Sectra PACS	n=9	100%	Sectra PACS	n=9	100%
VISUS JiveX	n=9	100%				VISUS JiveX	n=10	100%	VISUS JiveX	n=10	100%

PACS Eastern Europe

Segment definitions can be found on page 36.



Solutions Not Ranked

Grading methodology can be found on page ii.

	Overall performance score (100-point scale)	# of unique orgs	Customer experience pillars					
			Culture	Loyalty	Operations	Product	Relationship	Value
VISUS JiveX	96.4*	3	A+*	A+*	A+*	A+*	A+*	A-*

*Limited data

Definitions can be found on page iii.

PACS Northern Europe

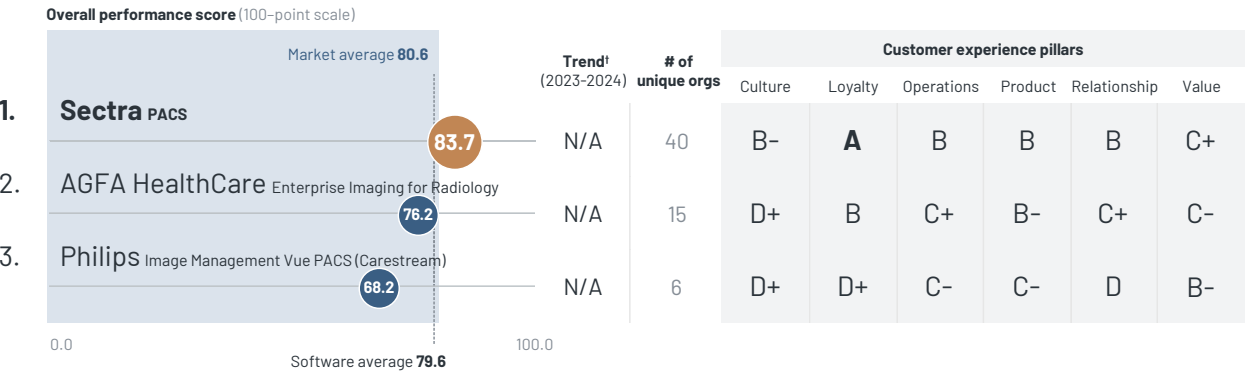
Segment definitions can be found on page 36.



SECTRA
Knowledge and passion

Ranked Solutions

Grading methodology can be found on page ii.



† Score trends are not available as the PACS Europe segment has been newly broken out into different European subregions.

Other Notable Performances

Ranked solutions for which at least 95% of respondents answered yes.

*Limited data

Avoids charging for every little thing?	Keeps all promises?	Part of long-term plans?	Would you buy again?
Philips Image Management Vue PACS (Carestream) n=4 100%*	None	AGFA HealthCare Enterprise Imaging for Radiology n=14 100%	Sectra PACS n=38 98%
		Sectra PACS n=40 98%	

PACS Southern Europe

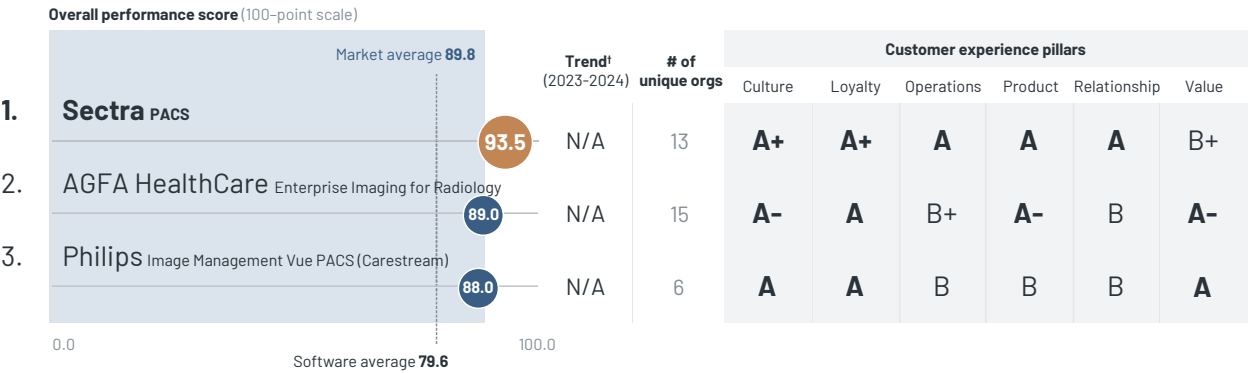
Segment definitions can be found on page 36.



SECTRA
Knowledge and passion

Ranked Solutions

Grading methodology can be found on page ii.



† Score trends are not available as the PACS Europe segment has been newly broken out into different European subregions.

Solutions Not Ranked

Ordered alphabetically

	Overall performance score (100-point scale)	# of unique orgs	Customer experience pillars					
			Culture	Loyalty	Operations	Product	Relationship	Value
Fujifilm Synapse	95.0*	4	A*	A+*	A*	A*	A+*	A+*
GE HealthCare Centricity PACS	76.3*	3	B*	C+*	B*	C+*	C+*	D*

*Limited data

Definitions can be found on page iii.

Other Notable Performances

Ranked solutions for which at least 95% of respondents answered yes.

*Limited data

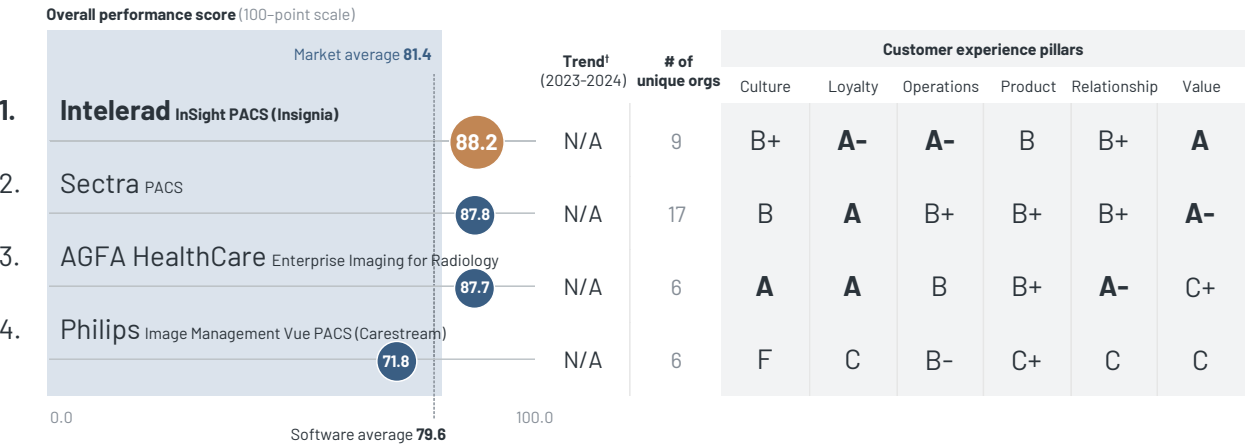
Avoids charging for every little thing?	Keeps all promises?	Part of long-term plans?	Would you buy again?
Philips Image Management Vue PACS (Carestream) n=5 100%*	Philips Image Management Vue PACS (Carestream) n=5 100%*	AGFA HealthCare Enterprise Imaging for Radiology n=14 100%	AGFA HealthCare Enterprise Imaging for Radiology n=14 100%
	Sectra PACS n=9 100%	Philips Image Management Vue PACS (Carestream) n=6 100%	Philips Image Management Vue PACS (Carestream) n=6 100%
		Sectra PACS n=12 100%	Sectra PACS n=10 100%

Segment definitions can be found on page 36.



Ranked Solutions

Grading methodology can be found on page ii.



† Score trends are not available as the PACS Europe segment has been newly broken out into different European subregions.

Solutions Not Ranked

	Overall performance score (100-point scale)	# of unique orgs	Customer experience pillars					
			Culture	Loyalty	Operations	Product	Relationship	Value
GE HealthCare Centricity PACS	67.3*	4	F*	D*	C*	C-*	C+*	C+*

*Limited data

Definitions can be found on page iii.

Other Notable Performances

Ranked solutions for which at least 95% of respondents answered yes.

*Limited data

Avoids charging for every little thing?	Keeps all promises?	Part of long-term plans?	Would you buy again?
Intelera InSight PACS (Insignia) n=7 100%	AGFA HealthCare Enterprise Imaging for Radiology n=6 100%	AGFA HealthCare Enterprise Imaging for Radiology n=6 100%	AGFA HealthCare Enterprise Imaging for Radiology n=5 100%*
Sectra PACS n=15 100%		Sectra PACS n=17 100%	Intelera InSight PACS (Insignia) n=9 100%

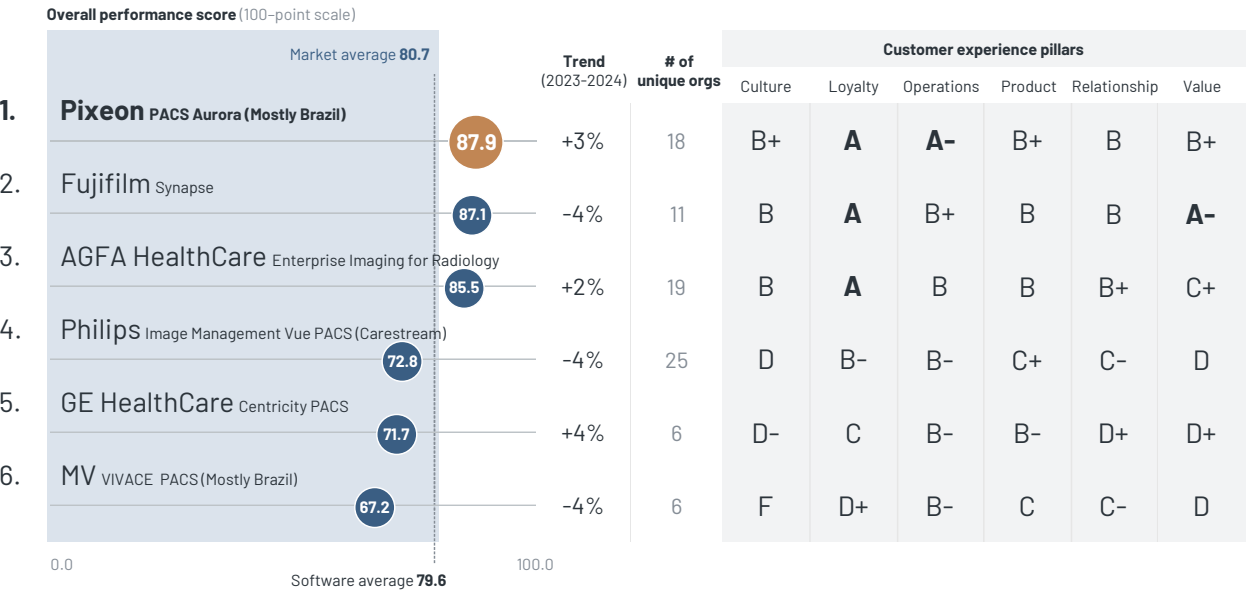
PACS Latin America

Segment definitions can be found on page 36.



Ranked Solutions

Grading methodology can be found on page ii.



Other Notable Performances

Ranked solutions for which at least 95% of respondents answered yes.

Avoids charging for every little thing?		Keeps all promises?		Part of long-term plans?		Would you buy again?	
Fujifilm Synapse	n=11 100%	None		AGFA HealthCare Enterprise Imaging for Radiology	n=18 100%	AGFA HealthCare Enterprise Imaging for Radiology	n=17 100%
				Fujifilm Synapse	n=11 100%	Fujifilm Synapse	n=11 100%

PACS Middle East/Africa

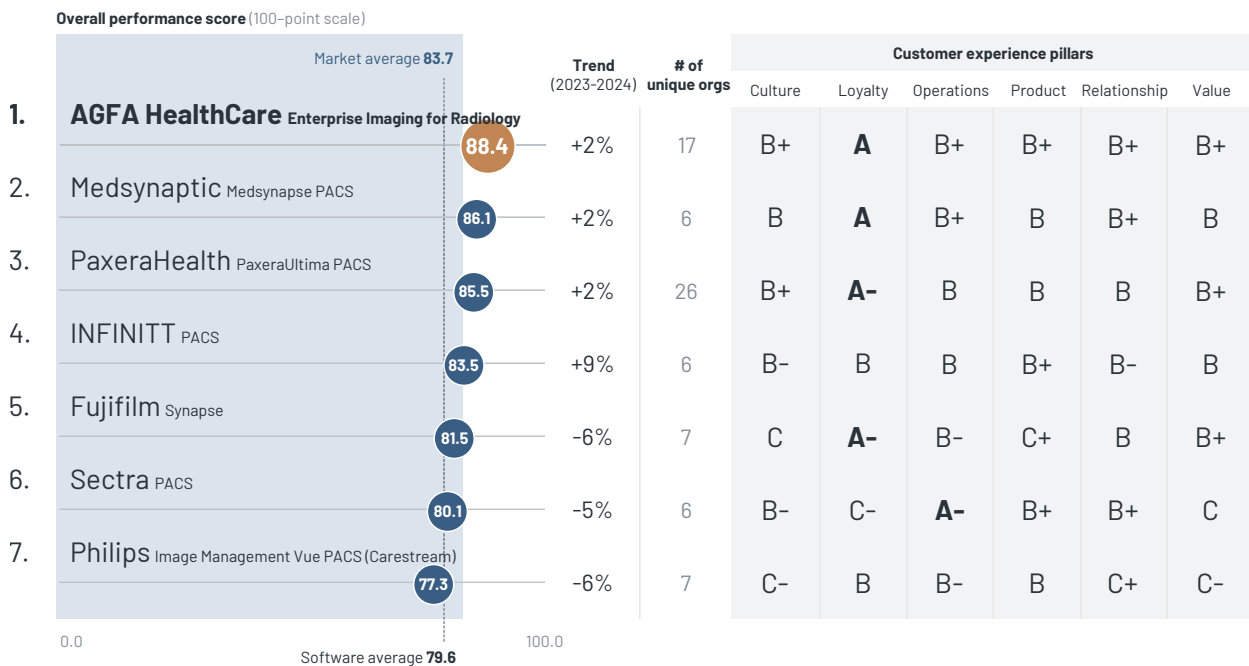
Segment definitions can be found on page 36.



AGFA HealthCare

Ranked Solutions

Grading methodology can be found on page ii.



Solutions Not Ranked

Ordered alphabetically

GE HealthCare Centricity PACS

59.1*

5

Philips IntelliSpace PACS [NP]

90.8*

3

VISUS JiveX

95.2*

3

*Limited data [NP] Not primary

Definitions can be found on page iii.

PACS Middle East/Africa Continued



Other Notable Performances

Ranked solutions for which at least 95% of respondents answered yes.

*Limited data

Avoids charging for every little thing?

Fujifilm Synapse n=7 100%

Keeps all promises?

None

Part of long-term plans?

AGFA HealthCare Enterprise Imaging for Radiology n=17 100%

Fujifilm Synapse n=6 100%

Medsynaptic Medsynapse PACS n=5 100%*

Philips Image Management Vue PACS (Carestream) n=6 100%

PaxeraHealth PaxeraUltima PACS n=26 97%

Would you buy again?

Fujifilm Synapse n=6 100%

Medsynaptic Medsynapse PACS n=6 100%

AGFA HealthCare Enterprise Imaging for Radiology n=17 96%



Shared Care Records/HIE Canada

Segment definitions can be found on page 36.

Solutions Not Ranked

Grading methodology can be found on page ii.

	Overall performance score (100-point scale)	# of unique orgs	Customer experience pillars					
			Culture	Loyalty	Operations	Product	Relationship	Value
Orion Health Orion Amadeus	76.5*	3	A~*	C*	B*	C~*	C+*	C+*

*Limited data

Definitions can be found on page iii.

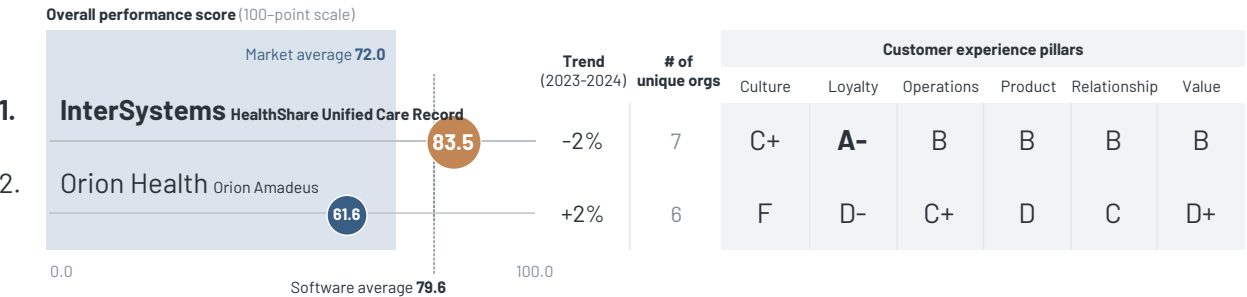
Shared Care Records/HIE Europe

Segment definitions can be found on page 36.



Ranked Solutions

Grading methodology can be found on page ii.



Other Notable Performances

Ranked solutions for which at least 95% of respondents answered yes.

*Limited data

Avoids charging for every little thing?	Keeps all promises?	Part of long-term plans?	Would you buy again?
None	None	InterSystems HealthShare Unified Care Record n=6 100%	InterSystems HealthShare Unified Care Record n=7 100%

Shared Care Records/HIE Latin America

Segment definitions can be found on page 36.



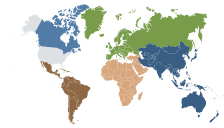
Solutions Not Ranked

Grading methodology can be found on page ii.

	Overall performance score (100-point scale)	# of unique orgs	Customer experience pillars					
			Culture	Loyalty	Operations	Product	Relationship	Value
InterSystems HealthShare Unified Care Record	93.9*	4	A~*	A+*	A~*	A*	A+*	A*

*Limited data

Definitions can be found on page iii.



Recent Insights—Global Software



[Global \(Non-US\) Healthcare IT Trends 2023](#)

Understanding Organizations' IT Priorities Pre- and Post-Pandemic

Key Findings:

1. EMR/Digitalization Investments the Highest IT Priority; Digital Health Also a Top Priority
2. Cybersecurity, IT Infrastructure & Interoperability Are Highest Non-Clinical Priorities
3. Cloud Adoption/Planning on the Rise, with Asia, Oceania & Latin America Leading Out
4. Microsoft Azure & Private Cloud Options Are Top Two Preferences, with AWS Third
5. Deloitte Most Considered for Future Engagements; PwC, KPMG & EY Also Have High Mindshare

Bring Your Ideas to the Table

Together, we can shape the future of healthcare

KLAS is passionate about bringing together leaders from across healthcare, facilitating their collaboration, and sharing their collective wisdom to spark positive change. Attend a KLAS event in 2024 to offer your unique insights. We need your voice!



Social Determinants of Health Summit 2023

Upcoming 2024 KLAS Events

Middle East Summit

January 27–28, Dubai, United Arab Emirates
(For healthcare delivery organizations located in the Middle East region)

Enterprise Imaging Summit

April 16–17, Park City, UT

K2 Collaborative Summit

May 14–15, Salt Lake City, UT

Global Summit

June 3–5, Lake Maggiore, Italy (For healthcare delivery organizations outside the US)

Arch Collaborative Learning Summit

July 17–19, Salt Lake City, UT (Arch Collaborative members only)

Healthcare Operations Summit

September 10, Park City, UT

Digital Health Investment Symposium (DHIS)

September 10–11, Park City, UT

Social Determinants of Health Summit

October 7–8, Salt Lake City, UT

Revenue Cycle Summit

October 29–30, Park City, UT

2023 Event Executive Overviews

Learn more about the collaboration and outcomes that were sparked by some of our 2023 events:

[KLAS Arch Collaborative Learning Summit DHIS 2023](#)
[K2 Collaborative Summit 2023](#)
[Revenue Cycle Management Summit 2023](#)
[Social Determinants of Health Summit 2023](#)



Stay up to date on KLAS events at
klasresearch.com/events

A man with glasses and a woman with curly hair are smiling and looking at a tablet together. The man is wearing a dark green shirt and the woman is wearing a grey blazer over a striped shirt. The background is a blurred office setting.

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Segments & Definitions



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Electronic health record (EHR) software products used outside the US that provide core inpatient functionality, including a clinical data repository, order entry, ePrescribing, results reporting, and/or clinician charting and documentation.

Digital Pathology

- Europe 21

Imaging solutions pathologists use instead of microscopes for primary diagnoses. Tools help view, measure, and count cellular details and can also include workflow and reporting tools and AI integration. Pathology slide scanners are not included in this segment.

PACS

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Picture archiving and communication system (PACS) software used outside the US that archives digital images and provides a platform for displaying and transmitting images for physician review.

Shared Care Records/HIE

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Solutions that facilitate the use of shared patient records at the point of care and aggregate the data for innovative uses (e.g., analytics, population health management).

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