

## **Chapter 1**

- Executive Summary for the U.S. Health Information Exchange Market, 2012
- U.S. Health Information Exchange Market Executive Summary
- Executive Summary of Key Findings for the U.S. Health Information Exchange Market
- Introduction and Overview
- Research Methodology
- Primary and Secondary Research Methodology
- Forecasting Constraints
- Exclusions and Limitations

## **Chapter 2**

- Glossary of Terms and Health Information Exchange Fundamentals
- Acronyms and Terms
- List of Acronyms and Terms
- Health Information Exchange Basics
- What Is Health Information Exchange?
- Definition—The Basics
- Is Health Information Exchange a Verb or Noun?
- The Key Purpose and Function of Health Information Exchange
- Key Participants in Health Information Exchange
- Use Cases for Health Information Exchange
- Core and Value-added Services for Health Information Exchange
- Benefits
- Health Information Exchange Technical Overview
- Technology Components
- Data Transmission Types
- Data Exchange Models
- Centralized HIE
- Federated HIE
- Hybrid HIE
- Standards

## **Chapter 3**

- Government Efforts to Drive Health Information Exchange
- Health Information Exchange in the United States
- History and Background
- Recent Federal Initiatives Driving Health Information Technology
- Overview of HITECH Programs and Initiatives
- Meaningful Use of Electronic Health Records
- Moving from Stage 1 to Stage 2—Greater Focus on Health Information Exchange
- The Nationwide Health Information Network
- The DIRECT Project—Enabling Point-to-Point Data Exchange

## **Chapter 4**

- Market Segmentation and Adoption
- Health Information Exchange Market Segments
- Introduction to Health Information Exchange Market Segmentation
- Introduction to Health Information Exchange Market Segmentation
- Health Information Exchange Maturity and Adoption

Development Phases, Maturity Models, and Adoption Trends for Health Information Exchange  
Health Information Exchange Development Phases  
Model for Achieving Health Information Exchange Maturity  
Adoption Trends in Health Information Exchange  
Public HIEs/HIOs  
Hospital HIE  
Physician HIE

## **Chapter 5**

Health Information Exchange Market Engineering Measurements and Market Dynamics  
Market Engineering Measurements and Market Dynamics  
Market Engineering Measurements  
Market Age  
Market Saturation  
Costs  
Start-up and Implementation Costs  
Recurring Costs  
Price Sensitivity  
Potential Customers  
Market Competitors  
Degree of Competition  
Degree of Technical Change  
Customer Satisfaction  
Customer Loyalty  
Industry Challenges  
Lack of Consistent Standards for Data Exchange  
Lack of HIT System Interoperability  
Need to Ensure the Privacy and Security of Protected Health Information (PHI)  
Enabling Trust in Data Quality and Data Governance  
Incorporation of Paper-based Information  
Market Drivers  
Growing Provider Consolidation  
Increased Adoption of EHRs and Progressive Meaningful Use Requirements  
Need to Improve Cost and Operational Efficiencies  
Preparation for Accountable Care and Value-based Purchasing  
Market Restraints  
High Costs and Lack of ROI  
Competing IT Priorities and Time Constraints  
Fear of Losing Competitive Market Advantage  
Lack of Uniform Goals and Strategic Vision  
Uncertainty and Confusion about Overall Market Direction

## **Chapter 6**

Health Information Exchange Competitive Market Structure and Select Vendor Profiles  
Overview of the Competitive Landscape

- Competitive Market Structure
- Business Models and Pricing Approaches
- Business Models
- Pricing Approaches
- Public HIE
- Private HIEs
- Select Vendor Profiles
- Vendor Profiles

## **Chapter 7**

- Summary of Strategic Market Issues and Future Trends
- Health Information Exchange Strategic Market Issues and Future Trends
- Summary of Strategic Market Issues and Future Trends
- Efforts to Ensure the Ongoing Viability of Public HIE Likely to Increase
- The Drive for Greater Information Transparency Will Continue to Challenge Privacy Concerns
- The Move to Accountable Care Will Mostly Benefit Private HIEs in the Short Term
- The Growth of Cloud and Mobile HIE Will Accelerate Significantly
- Innovation in Providing Value-added HIE Services Will Be the Key Competitive Differentiator

## **Chapter 8**

- References and Decision Support Database
- References
- Bibliography
- Databases
- Projected National Health Expenditures and Select Economic Indicators
- National Health Expenditures by Source of Funds
- Percent Distribution of National Health Expenditures by Source of Funds
- Projected National Health Expenditures by Select Objects
- Annual Revenues and Growth Rates for Select Healthcare Industries by Business Type
- Annual Revenues for Select Healthcare Industries by Source of Revenue
- Number and Growth Rate of Healthcare Establishments by Type
- Stage 1 Meaningful Use Core Objectives for Hospitals and Eligible Providers
- Stage 1 Meaningful Use Menu Objectives for Hospitals and Eligible Providers
- Select Hospital Metrics
- Number of Community Hospitals by Location and Ownership Type by State
- Number of Active Physicians and Nurses by State
- Number and Growth for Select Physician Characteristics for Total and Office-based Populations
- Number and Growth of Physician Specialties for Total and Office-based Populations

## **List of Figures**

### **Chapter 2**

- Glossary of Terms and Health Information Exchange Fundamentals
- 2-1 Health Information Exchange Market:  
Definition of Select Terms (United States), 2012
- 2-2 Health Information Exchange Market:  
Key Participants and Select Electronic Data Exchanged (United States), 2012

2-3 Health Information Exchange Market:  
Select Core and Value-Added Health Information Exchange Services (United States),  
2012

2-4 Health Information Exchange Market:  
Examples of Select HIE Standards by Category (United States), 2012

#### Chapter 3

Government Efforts to Drive Health Information Exchange

3-1 Health Information Exchange Market:  
Select HITECH Programs and Initiatives and Allocated Funds (U.S.), 2012

3-2 Health Information Exchange Market:  
Awardees for ONC's State Health Information Exchange Cooperative Agreement  
Program and  
Challenge Grants Programs (United States), 2012

3-3 Health Information Exchange Market:  
Number of Public Health Information Exchange Organizations by State (United States),  
2012

3-4 Health Information Exchange Market:  
Stage 2 Meaningful Use Core and Menu Objectives for Eligible Hospitals and  
Eligible Professionals (United States), 2012

#### Chapter 5

Health Information Exchange Market Engineering Measurements and Market  
Dynamics

5-1 Health Information Exchange Market:  
Impact of the Top Five Industry Challenges (United States), 2013-2016

5-2 Health Information Exchange Market:  
Market Drivers Ranked in Order of Impact (United States), 2013-2016

5-3 Health Information Exchange: Market Restraints Ranked in Order of Impact  
(United States), 2013-2016

#### Chapter 6

Health Information Exchange Competitive Market Structure and Select Vendor  
Profiles

6-1 Health Information Exchange Market:  
Competitive Structure (United States), 2012

#### Chapter 8

References and Decision Support Database

8-1 Decision Support Database: Projected National Health Expenditures and Selected  
Economic Indicators  
(United States), 2009-2015

8-2 Decision Support Database: National Health Expenditures by Source of Funds  
(United States),  
2009-2015

8-3 Decision Support Database: Percent Distribution of National Health Expenditures by  
Source of Funds (United States), 2009-2015

8-4 Decision Support Database: Projected National Health Expenditures by Selected  
Objects  
(United States), 2009-2015

- 8-5 Decision Support Database: Annual Revenues and Growth Rates for Selected Healthcare Industries by Business Type (United States), 2000 and 2009
- 8-6 Decision Support Database: Annual Revenues for Selected Healthcare Industries by Source of Revenue (United States), 2009
- 8-7 Decision Support Database: Number and Growth Rate of Healthcare Establishments by Type (United States), 2002 and 2007
- 8-8 Decision Support Database: Stage 1 Meaningful Use Core Objectives for Hospitals and Eligible Professionals (United States), 2012
- 8-9 Decision Support Database: Stage 1 Meaningful Use Menu Objectives for Hospitals and Eligible Professionals (United States), 2012
- 8-10 Decision Support Database: Select Hospital Metrics (United States), 2010
- 8-11 Decision Support Database: Number of Community Hospitals by Location and Ownership Type by State (United States), 2009
- 8-12 Decision Support Database: Number of Active Physicians and Nurses by State (United States), 2009
- 8-13 Decision Support Database: Number and Growth for Select Physician Characteristics for Total and Office-based Populations (United States), 2000 and 2009
- 8-14 Decision Support Database: Number and Growth of Physician Specialties for Total and Office-based Populations (United States), 2000 and 2009

## **List of Charts**

### Chapter 2

#### Glossary of Terms and Health Information Exchange Fundamentals

##### 2.1 Health Information Exchange Market:

Health Information Exchange Use Cases by Key Stakeholders (United States), 2012

##### 2.2 Health Information Exchange Market:

Potential Benefits and Advantages of Health Information Exchange (United States), 2012

##### 2.3 Health Information Exchange Market:

Centralized Model (United States), 2012

##### 2.4 Health Information Exchange Market:

Federated Model (United States), 2012

##### 2.5 Health Information Exchange Market:

Hybrid Model (United States), 2012

### Chapter 3

#### Government Efforts to Drive Health Information Exchange

##### 3.1 Health Information Exchange Market:

Key Milestones in the Evolution of HIE from 1985 through 2011 (United States), 2012

##### 3.2 Health Information Exchange Market:

Organizational Structure for U.S. Government Agencies Related to Health IT (United States), 2012

3.3 Health Information Exchange: Federal Health IT Strategic Goals (United States), 2012

3.4 Health Information Exchange: Core EHR Functionalities at the Heart of Meaningful Use

(United States), 2012

3.5 Health Information Exchange Market:  
Meaningful Use Objectives by Stage (United States), 2012

3.6 Health Information Exchange Market:  
Meaningful Use Objectives by Stage Requiring Health Information Exchange  
Capabilities  
(United States), 2012

3.7 Health Information Exchange Market:  
Participants in the Nationwide Health Information Exchange (United States), 2012

3.8 Health Information Exchange Market:  
The Four Components of Nationwide Health Information Exchange (United States), 2012

#### Chapter 4

Market Segmentation and Adoption

4.1 Health Information Exchange Market:  
Market Segments (United States), 2012

4.2 Health Information Exchange Market:  
Key Phases and Activities for Developing Health Information Exchange (United States),  
2012

4.3 Health Information Exchange Market:  
HIE Maturity Model (United States), 2012

4.4 Health Information Exchange Market:  
Information Received Via Health Information Exchange Among Hospitals  
Who Own an HIE System (United States), 2012

4.5 Health Information Exchange Market:  
Hospitals' Plans for HIE Adoption (United States), 2011 and 2012

#### Chapter 5

Health Information Exchange Market Engineering Measurements and Market  
Dynamics

5.1 Health Information Exchange Market:  
Market Engineering Measurements, U.S., 2012