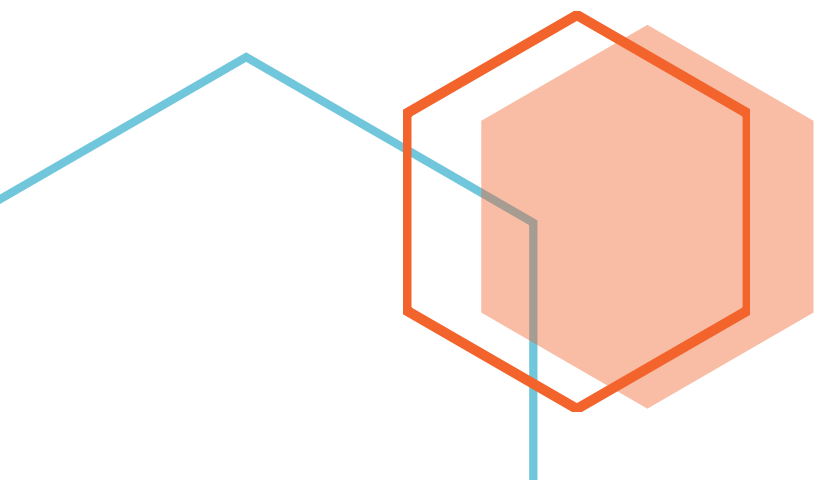




2019 Black Book CFO & Financial Leadership Survey

Healthcare Executive Perspectives, Trends and Managerial
Opinions on Finance Technology and Outsourced Services

HOSPITALS, HEALTH SYSTEMS, ANCILLARY PROVIDERS
AND PHYSICIAN ORGANIZATIONS





Executive Summary

2019 Black Book Research

PART ONE:

CFO's and Enterprise Digital Transformations

According to our latest research study, investment in digital transformation is vital for health systems to keep a competitive advantage. Overall, 8 in 10 CFOs surveyed believe that digital transformation is critical for their health system to survive long term.

PART TWO:

The Growing Collaboration between Health System CFOs and CIOs

The relationship between senior information systems and financial operations officers is becoming more collaborative and stronger. But pressures to the alliance remains a problem in health systems including a continuing lack in understanding on both parties to converge on strategies, investment mindsets, healthcare customer experience, business models, and agendas.

PART THREE:

The Healthcare CFO of the Future

The nature of value-based care, mergers and acquisitions, profitability and consumerism urgently call for a new breed of finance leaders. The former function of highly conservative, rule-oriented, strict managerial structures is being pushed to transition to a more forward-looking model requiring innovative, disruptive thinkers not normally supported by the traditional healthcare CFO role.

APPENDIX:

Top Rated Health System Financial Services and Software Vendors 2019

2019 Black Book Healthcare Financial Technology Survey

1534 Participants Q1/Q2 2019

200 Chief Financial Officers

61 Managed Care Directors

656 Revenue Cycle Managers

52 Controllers

184 Vice President, Finance

384 Business Office Managers

Organizations Represented

Single Hospitals 17%

Systems with 2-9 Hospitals 55%

Systems with 10+ Hospitals 14%

Other 13%

Black Book conducted 13 separate online and telephone surveys completed by over 1500 senior finance executives of the nation's hospitals, health systems, physician organizations, ancillary support companies, consultants and other healthcare organizations.

Based on responses to dozens of questions this report includes key findings from the surveys as well as recommendations and implications associated to each.



Over the next decade, healthcare finance will have to disrupt itself to meet the demands of consumers, patients, regulators, boards, marketing chiefs, IT divisions, auditors and internal stakeholders to serve as a true business partner, not the back office focused on billing, payment transactions, insurance and historical reporting.

The CFO's role in managing technology decisions across the health system is shifting the role to requiring an updated set of technical skills confirming the assumption that technology responsibilities will be a primary part of the job descriptions of financial leaders.

Financial managers must have a strong technical background and CFOs will require the data science skills that currently fall under the health system CIO.

Health system CFOs responsibilities related to technology, 2019

- Technology purchase influencer, Non Finance Area 66%
- Technology purchase influencer, Finance Area 97%
- Uses Data analytics to Inform Technology Strategy 44%
- Involvement in managing Finance Department Technology 80%
- Responsible for Performance Risk Metrics 90%
- Responsible for Risk Associated with Health System IT 98%
- Manages IT Investment Budget 44%

67% of Financial leaders rate emerging finance-related technologies as the biggest disrupter to their health system operations.

83% of Financial leaders rate Big Data and advanced Analytics as the biggest disruptor to their current workflows and operations.

92% say their healthcare organization is taking an active role in addressing technology and analytics-fueled disruption.

86% of finance leaders see a need to develop future or exiting talent in the face of advanced financial technology and analytics.



Few healthcare financial organizations have digitized more than 25 percent of their transactional work despite respondents confirming that highly digitalized health system financial divisions report notable returns as compared to less technical hospital finance departments.

Percentage of hospitals finance work that has been fully digitized or automated since 2017

50 Percent or More	8%
26 to 49 Percent	12%
1 to 25 Percent	48%
None or Close to None	30%

Return-on-Investment generated from finance organizations' digitalization and automation since 2017 among hospitals digitizing more that 25 percent of their financial processes.

Substantial	86%
Minimal	3%
None	0%

“The top concern for almost every healthcare leader including CFOs is cost control through better data and analytics,” reports Doug Brown, President of Black Book Research. “And the role of health systems CFOs has progressed far from the traditional accounting, reporting and compliance focus to technology, strategy, innovation and consumer experience.”



PART ONE: CFO's and Enterprise Digital Transformations

To stay competitive in the current healthcare provider marketplace, 79% of CFO respondents and 89% of all other senior finance officers in health systems plan to increase their investment in digital transformations by the end of 2020.

Of these, 68% forecast an increase of more than 20% by the end of Q1 2020.

Notably, while 28% of hospitals and health systems over 150 beds admit playing catch up to the provider organizations in their markets nationally, 19% claim matching their competition's digital offerings. Only 9% of respondents indicated that their digital transformation investment efforts are directed at their regional competition through differentiation, compared to 40% of all other non-healthcare industry CFOs measured by Black Book surveys.

"Over the past five years, investment strategies for digital transformation have been influenced among healthcare providers more by the desire to improve operational performance and reduce costs," said Doug Brown, President of Black Book. "Survey results indicate that future investments are moving towards improving patient experience, and differentiating from the competitors via technological innovations, including the interaction with patient payment and financial systems."

In 2019, creating exceptional patient and health consumer experiences represented a shift from internal operations concerns to external perceptions of healthcare services, outcomes, product lines, financial interactions, and improved care technologies that at least keep up with local competitive providers organizations.

In the Q1-Q2 2019 Black Book survey, CFOs agree that their top IT challenges are:

System Integration Across the Healthcare Enterprise (92%)

Upkeep of Current Financial Legacy Systems (84%)

Lack of Financial IT Talent (81%)

"Hospital financial functions which could benefit immensely from technology investments have been routinely deprioritized for the past five years because of budgets required for pricey electronic health records implementations", said Brown. "Investment decisions have been made even more complex because there has been fluidity in healthcare organizations in determining key performance indicators to measure the financial success of new information technologies like population health tools, for instance."



85% of Senior Healthcare Financial Leaders reveal That they do not have suitable financial metrics for IT ROI Compared to 36% of CFOs in other industries.

The Black Book survey suggests that the adoption of new technologies in the healthcare finance function through the next 5 years is correlated to better data quality, data mining for strategic analysis, optimized financial processes, minimizing billing errors, reducing operational costs and streamlined financial reporting.

Three-quarters of all US hospitals have automated their financial transactions processes since 2013, however most are now outdated

Top Healthcare Financial Processes Automated in Q2 2019

Accounts Receivable/Accounts Payable 80%

Financial Reporting and Control 74%

Working Capital Management/Treasury 70%

94% of Healthcare Systems and Provider Organizations anticipate a significant shift in IT spending to the CFO's Office in 2020

Top Healthcare Processes to Be Automated in 2019-2023

Financial Planning 86%

Advanced Financial Analytics 83%

Budgeting and Cost Accounting 79%

Forecasting 75%

Strategic Planning 61%

Financial Reporting 58%

Future investments in healthcare financial automation will focus on better strategy, analysis and predictions for growth. 57% of CFOs report that with few proven cases of digitization in healthcare finance including few best practices to pattern after, the finance team has been content to let CIOs pursue the issue. However, 94% of CFOs intend to dedicate more time to the application of digital technologies to finance tasks *without CIO input* in the coming five year period.



90% of CFOs expect to move to active implementations of transformational software and services in 2020 from the current state of tire kicking

Current Drivers of Financial Digital Transformations in Healthcare

- Reduce Cost of Care 96%
- Improved Care Coordination 93%
- Ready for Value Based Care Payments 90%
- Upgrade Credit Rating 90%
- Improve Patient/Consumer Experience 76%
- Improving Regulatory Status 74%
- Steady Predictable Earnings 72%

Financial operations to accelerate decision support is the short-term goal of 88% of all CFOs surveyed in Q1-Q2.



PART TWO:

The Growing Collaboration between Health System CFOs and CIOs

The 2019 Black Book survey identified the growing trend that CFOs are shifting their priorities from cost cutting to rapidly investing in financial technologies. As nearly 51% of financial executives report the implementation of analytics and (44%) broader distributed ledger technologies.

The year-to-year comparison of Black Book's financial leadership technology surveys reveal dramatic changes in the adoption of financial services IT after nearly 7 years of recorded declines or reductions in the budgets allocated for financial software and upgrades.

94% of CFOs surveyed agreed that their past organizational CIO and senior IT management did not support a culture including their boards where financial technology upgrades and acquisitions were not prioritized as initiatives that impacted enterprise strategy.

90% of financial leaders and management strongly agreed that the CIOs and IT management undervalued the needs of financial digital transformation and financial tools, instead prioritizing and convincing their boards that electronic health record vendor packages were the best spending plan.

98% of respondents strongly agree that it's the healthcare CFO's job to ensure their organization fully realize the benefits of technology investments, not the CIO's job.

This has resulted in 94% of marginally performing hospital CFOs nationally claiming they are not prepared to handle new healthcare delivery and payment models with the tools they currently have. Comparatively, 89% of the top financially performing hospitals in the country report having the organizational technology tools to address modified payment strategies.

While senior financial officers struggled with the pressures of smaller operating incomes, rising labor and supply costs, shrinking volumes, reduced reimbursements, declining patient volumes and changing healthcare delivery models, 83% report that in the past fiscal year they received add-on responsibilities of organizational productivity, strategic and innovation growth initiatives, and exceptional performance.



“Technology is changing, expanding and blurring the roles of CIOs and CFOs in the healthcare industry,” said Brown. “More than purely handling the financials and performance of health systems, senior financial management is now expected to have a thorough knowledge of consumers and the role of technology in reaching them. In a noticeable shift since the acquisition of enterprise-wide EHR systems lead by CIOs, CFOs have become the executive charged with digital transformations to improve competitive advantages, strategic growth and innovation across all customer touch points, while measuring the technologies’ ROI.

Although CIO-CFO collaboration in health systems is critical, 93% of CFOs in financially struggling facilities report barriers to agreeable cooperation, but so did 84% of CFOs in successfully performing health systems.

According to surveyed CFOs, 38% report increased collaboration between CFOs and CIOs since the implementation of their enterprise EHR, up from 19% when measured in 2015.

88% of CFOs report having increased involvement in their health system IT agenda since the implementation of their enterprise EHR as compared to 12% in 2015.

Main barriers to health system CIO- CFO Collaboration

85% of all respondents state that their organizational structure prevents CIO-CFO collaboration. 89% of CEO's interviewed disagree with this statement.

82% of CFO's state they have insufficient understanding of IT issues as the barrier to them not being included in technology selections and approvals prior to 2014.

CIOs surveyed in Q4 2018 claimed the processes and tools in finance are incomparable to IT functions and remain a significant barrier to understanding.

90% of all respondents agree that the absence of key performance indicators that link IT agendas to financial performance greatly limits their success.



PART THREE: The Healthcare CFO of the Future

91% of CFOs surveyed state their top priorities for 2020 will be managing organizational cost reductions followed by 85% needing to predict the impact of new payment models through enhanced reporting.

62% of survey respondents say advanced analytics is the most needed skill set to be developed in the financial ranks of health systems in 2019-2020. 95% of CFOs agree that the CFO of the future will require a much more robust data analytics skill set than 2019 CFOs.

91% of CFOs surveyed state their top priorities for 2020 will be managing cost reductions followed by 85% needing to predict the impact of new payment models through enhanced reporting.

76% of all financial leaders from supervisor through CFO levels report needing better performance management dashboards as overall satisfaction with current reporting systems is less than 9%.

92% of survey respondents believe the CFO of the future must be a better job leveraging technology and staff with IT skills for health providers to succeed financially.

As health systems CFOs steam ahead toward digital transformational technology, 83% believe the finance function must provide more advanced analytic support that most current decision support and cost accounting vendors have offered, particularly those attached to enterprise EHRs.



"Financial leaders will need to recruit and retain staff who possess traditional financial expertise, flexibility in adapting new payment models, willingness to accept nontraditional responsibilities such as cybersecurity, patient satisfaction and innovation, but most importantly the eagerness to learn new technologies and process designs," said Brown. "The technological complexities of transforming financial systems and business integrations across health system units may well hasten the retirement of many old guard CFO's from the industry."

In 2020, all respondents concluded the most highly sought leadership skill sets that health system CEOs and boards will see in their financial team executives are:

Technology Acquisition and Implementation (89%)

Data Analytics (85%)

Financial Business Strategy (82%)

Financial Operations Administration (81%)

To assess whether the digital transformation is having an impact on the health system, the C-Suite needs a strategy that is more transformational and less incremental, thus the evolving role of the CFO taking the reins from the traditional CIO is inevitable. The degree of transformation required to achieve the results of value-based centric provider to align with financial business strategies and digital initiatives is the task at hand for the future CFO.

CFOs must be able to look ahead and connect digital trends and execute on digital initiatives to drive near term value and enable innovation with data long term state 88% of respondents.

CFOs must create an environment where risk is not seen as the enemy as only they can and effectiveness of innovative business models depends on their technological prowess.

Of the financial team respondents exclusive of CFOs and Controllers, 85% stated their CFO or senior leader lacked technological leadership skills in areas outside of financial transactions and reporting, and 92% lacked IT skills in general in areas outside the financial functions.



CONCLUSION

CFO's need to adapt to the increased complexities of advanced technology in their health systems in order to succeed in the future. As the healthcare business environment continues to evolve and change in expected and unexpected ways, financial leaders should take proactive steps to shape their role in directing the digital transformation of their entire organizations by understanding the technologies to leverage data and analytics, improve strategic decision making and adapt to changing business conditions.

ABOUT BLACK BOOK SURVEYS

Black Book, its founder, management and staff do not own or hold any financial interest in any of the vendors covered and encompassed in the surveys and polls it conducts. Black Book reports the results of the collected satisfaction, client experience, loyalty and product/service rankings in general publication and to media prior to vendor notification of any rating results and does not solicit or demand vendor participation fees, review fees, subscription requirements, brief charges or vendor collaboration for inclusion. With a base of over 840,000 professionals and users who partake in over 300 ongoing market surveys, another 3 million independent healthcare consumers also provide feedback on their health care delivery and financial satisfaction to produce these insights. The mission and business goal of Black Book is to bring international attention to the emerging trends and technologies in the new healthcare economy.

Since 2003, Black Book has polled the vendor satisfaction of system users across 30+ industries in the software services and product sectors across the globe to identify industry and sector conditions and forecasts. Black Book aims to improve all aspects of healthcare delivery and expand the stakeholder's voice from the front-line employee, IT users, financial and operational managers, clinical and nursing staff, C-suite officers, systems boards of directors, but most importantly the healthcare consumer.

For methodology, auditing, resources and comprehensive research and ranking data, see

www.BlackBookMarketResearch.com or contact Research@BlackBookMarketResearch.com
800.863.7590



APPENDIX:

TOP RANKING HEALTHCARE FINANCIAL SOFTWARE & TECHNOLOGIES

BLACK BOOK USER SURVEYS: EIGHTEEN QUALITATIVE KEY PERFORMANCE INDICATOR RATED

AUDITED Q1-Q2 2019

2019 ENTERPRISE PATIENT MASTER INDEX & CLEAN UP

1. VERATO
2. NEXTGATE
3. CHANGE HEALTHCARE
4. SALESFORCE
5. HARRIS QUADRAMED
6. ORACLE
7. IATRIC SYSTEMS
8. INTERSYSTEMS
9. IBM
10. INTEROPTEX
11. MEDITECH
12. CERNER
13. INFINIT
14. STIBO
15. VISIONWARE
16. INTERFACEWARE
17. JUST ASSOCIATES
18. MEDISAS
19. ADL DATA SYSTEMS
20. WIPRO

PATIENT PAYMENT TECHNOLOGY & SOFTWARE

1. WAYSTAR
2. RECTANGLE HEALTH
3. CHANGE HEALTHCARE
4. PATIENTCO
5. NTHRIVE



6. TRANSUNION
7. RECONDO TECHNOLOGY
8. PATIENT PAY
9. INSTAMED
10. VECNA
11. EXPERIAN
12. HEALTHPAY24
13. CARECREDIT
14. EASYPAY COLLECT
15. INGENICO
16. IMAGINE SOFTWARE
17. HEALTHONE
18. CLEARGATE
19. SOLUTIONREACH
20. ADSC

RCM ANALYTICS SOLUTIONS

1. REVSPRING
2. HEALTH CATALYST
3. EXPERIAN
4. CHANGE HEALTHCARE
5. GRAYMATTER ANALYTICS
6. GROUPONE HEALTH SERVICE
7. MEDEANALYTICS
8. ABILITY EASE
9. NTHRIVE
10. VIZIENT
11. HCS INTERACTANT
12. INGENIOUS MED
13. MEDX
14. VIRENCE HEALTH
15. SAP BUSINESS OBJECTS



PROVIDER CONTRACT MANAGEMENT & OPTIMIZATION SOLUTIONS

1. AXIOM BY KAUFMAN HALL
2. NTHRIVE
3. CONTRACT WORKS
4. CHANGE HEALTHCARE
5. PMMC
6. INTELLICONTRACT
7. NEWGEN
8. CONTRACT LOGIX
9. VIZIENT HARRIS HEALTHCARE
10. ONBASE BY HYLAND
11. ECTEON
12. CONTRACT SAFE
13. CONCORD
14. CONTRACT GUARDIAN
15. VIE HEALTHCARE
16. EXPERIAN
17. POLICY MEDICAL
18. SSI GROUP
19. REVENUE MASTERS
20. ASC NET

REVENUE RECOVERY AND ACCOUNTS RECEIVABLE SOLUTIONS

1. TRANSUNION
2. SAGE INACCT
3. OPTUM360
4. CHANGE HEALTHCARE
5. PARALLON
6. STREAMLINE HEALTH
7. NTHRIVE



8. BESLER
9. REVINT SOLUTIONS
10. ORMED MIS
11. INTERSECT HEALTHCARE
12. ASCEND HEALTHCARE
13. ECATALYST REVENUE RECOVERY
14. SHERLOQ SOLUTIONS
15. MEDINOUS
16. PMMS
17. THE PATRIOT GROUP
18. QUADAX
19. HYLAND SOFTWARE
20. KEMBERTON
21. MCRC GROUP
22. HEALTHCARE RECOVERY GROUP
23. REVERGENCE HEALTHCARE
24. ALEGIS
25. SOUTHWEST RECOVERY

ENTERPRISE FINANCIAL PLANNING & RCM CONSULTANTS

1. KAUFMAN HALL
2. HURON CONSULTING
3. OPTUM ADVISORY BOARD
4. DELOITTE
5. HAYES MANAGEMENT CONSULTING
6. CONIFER HEALTH
7. ACCENTURE
8. KPMG
9. ECG MANAGEMENT CONSULTING
10. STOTENBERG CONSULTING
11. MOSS ADAMS
12. PWC
13. PIVOT POINT



14. LEGACY CONSULTING
15. NAVIGANT
16. IMPACT
17. JACOBUS CONSULTING
18. NTHRIVE
19. PREMIER
20. LEIDOS

COMPLEX CLAIMS SOLUTIONS

1. ARGOS HEALTH
2. WAYSTAR
3. ACCELICLAIM
4. OPTUM360
5. NTHRIVE
6. PLEXIS
7. QUADAX
8. COGNIZANT ROI BOLDER
9. AVAILITY
10. DST SYSTEMS
11. AVAILITY
12. SHERLOQ
13. EXPERIAN
14. CCS REVENUE CYCLE
15. CITADEL
16. HUMAN ARC
17. PNC HEALTHCARE
18. INFINIT
19. CONVERGENT

ENTERPRISE BUSINESS DECISION SUPPORT & COST ACCOUNTING SOLUTIONS

1. AXIOM BY KAUFMAN HALL
2. INFORMATION BUILDERS HEALTH DATA MANAGEMENT
3. HEALTH CATALYST ANALYTICS PLATFORM



4. STRATA DECISION STRATAJAZZ
5. ALLSCRIPTS EPSI
6. CHANGE HEALTHCARE
7. VIZIENT HARRIS HEALTHCARE
8. MICROSOFT BI
9. TABLEAU
10. DIMENSION INSIGHT
11. QLIK QLIKVIEW
12. JVION
13. SAP BUSINESS OBJECTS
14. ORACLE BUSINESS INTELLIGENCE
15. IBM COGNOS
16. INFORMATICA
17. EPIC COGNITO
18. CERNER HEALTH EDW
19. HBI SOLUTIONS SPOTLIGHT
20. NTT DATA

ENTERPRISE DOCUMENT MANAGEMENT & IMAGING

1. CIOX HEALTH
2. LEXMARK CONTENT MANAGEMENT
3. HYLAND ONBASE
4. NUANCE
5. STREAMLINE HEALTH LOOKING GLASS
6. EFILECABINET
7. IRON MOUNTAIN
8. 3M CHARTVIEW CHARTSCAN
9. DOCSTAR
10. AVREO
11. ACCUSOFT
12. DYNAFILE
13. CERNER DOCUMENT IMAGING
14. OPEX



15. QUEST DIAGNOSTICS QUANUM CHARTMAXX
16. XEROX
17. IBM MERGE
18. HYLAND ONECONTENT MCKESSON
19. DOCUVANTAGE
20. FUJITSU
21. AMS IMAGING
22. KOFAX

ENTERPRISE RESOURCE PLANNING

1. PREMIER ERP
2. ORACLE PEOPLESFT ENTERPRISE
3. ALLSCRIPTS (MCKESSON) ERP SOLUTIONS
4. INFOR HEALTHCARE SOLUTIONS SUITE
5. SAP
6. CERNER
7. WORKDAY
8. VIRENCE CENTRICITY
9. NETSUITE
10. EVIDENT CPSI HEALTHLAND
11. INACCT
12. DESKERA
13. HARRIS ERP
14. IRON MOUNTAIN
15. KRONOS WORKFORCE
16. GE HEALTHCARE API HEALTHCARE
17. PROGNOCIS INNOVATION
18. ACCENT ERP
19. PRIORITY SOFTWARE
20. HEALTHWARE SYSTEMS
21. ELINEXT



PATIENT ACCESS SOFTWARE

1. RECONDO TECHNOLOGY PATIENT ACCESS
2. ACCUREG SOFTWARE
3. CERNER HDX PATIENT ACCESS
4. TRANSUNION HEALTHCARE CLEARIQ
5. NTHRIVE
6. DCS GLOBAL PATIENT ACCESS
7. CHANGE HEALTHCARE
8. EXPERIAN HEALTHCARE ECARE NEXT
9. OPTUM360
10. WAYSTAR
11. SCI SOLUTIONS
12. MEDEANALYTICS
13. PAS HEALTH
14. MEDHOST
15. AVAILITY
16. EPIC SYSTEMS
17. KYRUSS
18. LIGHTNING BOLT
19. SSI GROUP
20. REVENUE360

HOSPITAL INPATIENT ACCOUNTING SYSTEMS

1. MEDITECH C/S PATIENT ACCOUNTING
2. CERNER PATIENT ACCOUNTING
3. EVIDENT CPSI
4. VIRENCE CENTRICITY BUSINESS
5. ALLSCRIPTS SUNRISE PATIENT FINANCIALS
6. EPIC RESOLUTE HOSPITAL BILLING
7. MEDHOST ENTERPRISE FINANCIALS
8. QUADRAMED AFFINITY FINANCIALS
9. MCKESSON PARAGON FINANCIALS
10. NTHRIVE



INPATIENT CLAIMS MANAGEMENT SYSTEMS

1. WAYSTAR
2. TRANSUNION
3. NTHRIVE
4. OPTUM360
5. TRUBRIDGE
6. CHANGE HEALTHCARE
7. EXPERIAN HEALTH CLAIMSOURCE
8. COGNIZANT TRIZETTO BOLDER HEALTH SOLUTIONS
9. REVSRING
10. RECONDO TECHNOLOGY
11. QUADAX
12. CONNANCE
13. CRANWARE
14. AVAILITY
15. SUTHERLAND GLOBAL
16. BRIDGESTONE
17. SSI GROUP SSI BILLING
18. MRA
19. PNC HEALTHCARE
20. ATHENACOLLECTOR

AMBULATORY CLAIMS MANAGEMENT & CLEARINGHOUSE SOLUTIONS

1. AVAILITY
2. WAYSTAR
3. OPTUM360
4. COGNIZANT TRIZETTO PROVIDER SOLUTIONS
5. VIRENCE CENTRICITY EDI
6. CHANGE HEALTHCARE
7. KAREO
8. TRUBRIDGE
9. ALLSCRIPTS PAYERPATH
10. OFFICE ALLY



11. SSI GROUP
12. PAYER PATH
13. APEX EDI
14. TRUBRIDGE
15. CLAIM MD
16. QUADAX
17. SUTHERLAND GLOBAL
18. MEDIGAIN
19. AVAIRIS
20. PRACTICE SUITE

CHARGEMASTER SOLUTIONS

1. NTHRIVE CDM
2. OPTUM360
3. PANACEA
4. VITALWARE
5. CRANEWARE
6. PMMC
7. VIRENCE CENTRICITY EDI

REVENUE CYCLE MANAGEMENT SOFTWARE Q3 2018 (TO BE UPDATED Q3 2019)

2018 END-TO-END RCM SOFTWARE & TECHNOLOGY, HOSPITAL CHAINS, SYSTEMS, CORPORATIONS, INTEGRATED DELIVERY NETWORKS & CORPORATION

1. OPTUM
2. WAYSTAR
3. CHANGE HEALTHCARE
4. RECONDO
5. CONIFER



2018 END-TO-END RCM SOFTWARE & TECHNOLOGY, HOSPITALS UNDER 100 BEDS

1. TRUBRIDGE
2. CERNER REVWORKS
3. WAYSTAR
4. CHANGE HEALTHCARE
5. SSI GROUP

2018 END-TO-END RCM SOFTWARE & TECHNOLOGY, HOSPITALS 101-200 BEDS

1. WAYSTAR
2. OPTUM360
3. CONIFER
4. CHANGE HEALTHCARE
5. TRUBRIDGE

2018 END-TO-END RCM SOFTWARE & TECHNOLOGY, HOSPITALS 200+ BEDS

1. CHANGE HEALTHCARE
2. WAYSTAR
3. -OPTUM360
4. CONIFER
5. RECONDO TECHNOLOGY

2018 END-TO-END RCM SOFTWARE & TECHNOLOGY PHYSICIAN PRACTICES & GROUPS

1. WAYSTAR
2. CHANGE HEALTHCARE
3. ALLSCRIPTS
4. CERNER REVWORKS
5. ATHENACOLLECT

REVENUE CYCLE MANAGEMENT OUTSOURCING Q3 2018 (TO BE UPDATED Q3 2019)

2018 END-TO-END RCM OUTSOURCING, HOSPITAL CHAINS, SYSTEMS, CORPORATIONS, INTEGRATED DELIVERY NETWORKS & CORPORATION

1. OPTUM360
2. CHANGE HEALTHCARE
3. GEBBS
4. PARALLON
5. R1 RCM



2018 END-TO-END RCM OUTSOURCING, HOSPITALS UNDER 100 BEDS

1. TRUBRIDGE
2. PARALLON
3. NTHRIVE
4. EXPERIAN
5. R1 RCM

2018 END-TO-END RCM OUTSOURCING, HOSPITALS 101-200 BEDS

1. R1 RCM
2. CONIFER
3. COGNIZANT TRIZETTO
4. OPTUM360
5. SSI GROUP

2018 END-TO-END RCM OUTSOURCING, HOSPITALS 200+ BEDS

1. COGNIZANT TRIZETTO
2. CHANGE HEALTHCARE
3. OPTUM360
4. GEBBS
5. NAVIGANT CYMETRIX

2018 END-TO-END RCM OUTSOURCING, PHYSICIAN PRACTICES & GROUPS

1. R1 RCM
2. COGNIZANT TRIZETTO
3. CHANGE HEALTHCARE
4. OPTUM360
5. ALLSCRIPTS