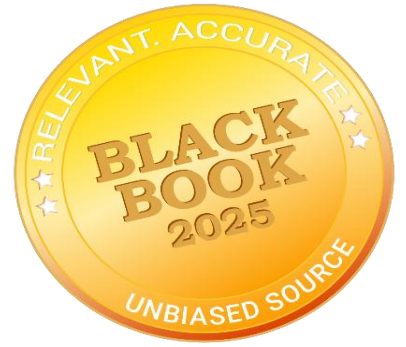


# BLACK BOOK RESEARCH

## Q2 2025 GLOBAL IT USER SURVEY RESULTS



# CANADA

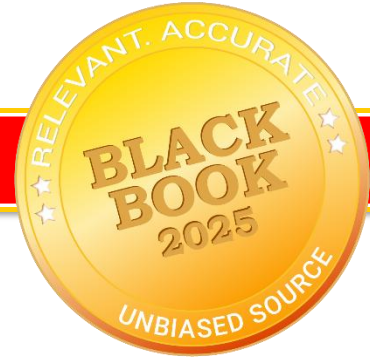


**SURVEY PERIOD: Q2 2024 – Q2 2025**

**PUBLISHED: JUNE 2025**

**COMPETITIVE INTELLIGENCE  
USER SURVEY RESULT SET**

**TOP CLIENT-RATED ELECTRONIC HEALTH RECORDS VENDORS**



**Black Book™** annually evaluates leading health care/medical software and outsourcing service providers across 18 operational excellence key performance indicators completely from the perspective of the client experience. Independent and unbiased from vendor influence, more than 2,900,000 healthcare IT users have contributed to various annual customer satisfaction polls. Suppliers also encourage their clients to participate in producing current and objective customer service data for buyers, analysts, investors, consultants, competitive suppliers, and the media. For more information or to order customized research results, please contact the Client Resource Center at +1-800-863-7590 or [info@blackbookmarketresearch.com](mailto:info@blackbookmarketresearch.com).

Black Book™, its founder, management and staff do not own or hold any fiscal interest in any of the vendors covered and encompassed in the surveys it conducts. Black Book reports the results of the collected satisfaction and client experience rankings in publication and to media prior to vendor notification of rating results and does not solicit vendor participation fees, review fees, inclusion, or briefing charges, and/or vendor.

© 2024, 2025 Black Book Market Research LLC, All Rights Reserved.

Unauthorized reproduction or distribution of this publication in any form is strictly prohibited without prior written consent. The information provided within this document has been sourced from what we believe to be reliable references. However, Black Book™, Black Book Market Research LLC, Black Book Research, and The Black Book of Outsourcing® disclaim all warranties regarding the accuracy, completeness, or adequacy of this information. Black Book assumes no liability for any errors, omissions, or misinterpretations of the information presented, and the reader is solely responsible for its application to achieve desired outcomes. The opinions expressed in this report are subject to change without notice. In an industry increasingly influenced by alliances between consultants and vendors, Black Book stands firmly independent. Our commitment to impartiality and credibility is your assurance of unbiased insights. Black Book holds no financial ties or incentives to recommend any specific software or outsourcing service providers. Our sole focus is to empower you to achieve your objectives by identifying the best solutions available. For further information, please visit [www.BlackBookMarketResearch.com](http://www.BlackBookMarketResearch.com).

# Table of CONTENTS

01 - 05

## Introduction

Respondents by Organization Type, Vendor Profiles, The State of Healthcare Information Technology & Electronic Health Records

06 - 08

## Guide

Guide for Understanding Chart Color Coding and Table Layouts, Functional Subsets of Respondent Groups, Key to Raw Scores, Stoplight Scoring Key, Raw Score Compilation and Scale of Reference, Scoring Key

09 - 11

## Overall KPI Leaders

Overall KPI Leaders: Summary of Criteria Outcomes, Solutions Vendors, Top-Rated Vendor Summary: All Segments, Summary Vendor Scores All 18 Criteria

12 - 22

## Individual KPIs



# Introduction

This report highlights findings related to Canada. It is one of several reports detailing the results from the latest surveys on global EHR, HIT and digital healthcare technologies conducted by Black Book Research worldwide.

Accessing feedback from current users of healthcare technologies is essential for informed vendor selection. Front-line users provide critical insights into a system's real-world functionality, reliability, and impact. While Canada's healthcare sector has made progress in identifying needs for digital solutions like electronic health records and analytics, many leaders still struggle to optimize client/vendor relationships, missing key clinical, financial, and operational benefits.

Trusting the feedback of front-line users is vital since they understand how systems truly perform beyond marketing claims. Their insights can highlight issues not visible in sales presentations. Leveraging this feedback in vendor selection helps ensure partnerships that meet specific organizational needs. This research aims to enhance peer recommendations and thorough due diligence, focusing on vendors' track records and past healthcare collaborations for better outcomes and technology adoption.

As of the second quarter of 2025, key economic and healthcare digitalization metrics for Canada have evolved as follows:

- **Electronic Health Record (EHR) Adoption Rate:** Approximately **62%** of Canadian healthcare providers have adopted EHR systems, marking a 3% increase from the previous 59% in 2024.
- **GDP per Capita:** Canada's nominal GDP per capita stands at approximately **\$55,890 USD**, reflecting economic growth from the prior year's figure of \$52,051.

These updated figures indicate a positive trend in both economic performance and the digitization of healthcare services in Canada.

## Respondents by Organization Type, Q2 2025 Update

Q2 2025 Survey Respondent Identification CANADA	Number of Responses Validated	Percent of Total Responses
Acute Care, General Hospitals, Academic Medical Centers	239	25%
Specialty Hospitals: Children, Oncology, Cardiac	77	8%
Subacute & Rehabilitation Hospitals	66	7%
Behavioral & Psychiatric Hospitals	55	5%
Critical Access & Rural Hospitals	134	14%
Private Hospitals and Medical Providers	83	8%
Government Hospitals, Military & Veterans Hospitals	22	2%
Long Term Care & Chronic Care Facilities	11	1%
Physician Clinics, Groups and Practices	44	4%
Outpatient Diagnostic Centers, Surgery Centers	55	5%
Others, Not Listed, Hospital Employed Physicians	172	18%
Total	958	100%

## Vendor Profiles

### CANADA

#### EHR VENDORS RECEIVING USER RESPONSES BY BLACK BOOK RESEARCH

##### Oracle Health

Oracle Health, formerly known as Cerner, holds a notable position in Canada's Electronic Health Record (EHR) market. As of early 2024, Oracle Health accounted for approximately 10% of the Canadian hospital EHR market share, with 54 installations across the country. This positions Oracle Health as a significant player in the Canadian healthcare sector, contributing to the digital transformation of medical records and patient care.

A key milestone in Oracle Health's Canadian expansion was the 2023 contract with the province of Nova Scotia to implement an integrated electronic care record system. This 10-year agreement under the "One Person One Record" (OPOR) initiative aims to unify care delivery across the province's entire healthcare system, covering more than one million residents. Once fully implemented, the OPOR system is expected to enhance clinical workflows, reduce duplication of tests, and improve continuity of care by ensuring secure access to real-time patient data.

Oracle Health's Millennium platform is recognized for its enterprise capabilities, including advanced population health management, analytics, and integrated revenue cycle tools. It supports clinical standardization efforts and streamlines complex workflows across multi-site health systems. In Canada, Oracle's presence has traditionally been strongest in larger provincial initiatives and regional hospitals that require scalable and interoperable platforms.

Since Oracle's acquisition of Cerner in 2022, the company has intensified its cloud transformation strategy, including migration paths for clients to Oracle Cloud Infrastructure (OCI). This offers Canadian customers new opportunities to enhance data security, reduce operational costs, and future-proof their infrastructure while complying with national privacy standards.

With a focus on interoperability, Oracle Health actively supports integration with provincial health information exchanges and diagnostic imaging repositories. The company's strategic investments in machine learning, voice recognition, and patient engagement technologies are positioned to further strengthen its relevance in Canada's evolving digital health ecosystem.

##### MEDITECH

MEDITECH has been actively expanding its Expanse Electronic Health Record (EHR) platform across Canada through strategic partnerships and innovative solutions. As of 2024, MEDITECH holds the largest share of the hospital EHR market in Canada, with approximately 38% of the market and over 165 active installations. Its stronghold is particularly evident among community hospitals, regional networks, and mid-sized health systems across provinces including Ontario, Manitoba, New Brunswick, and Nova Scotia.

In January 2024, Brant Community Healthcare System in Ontario became the first Canadian organization to adopt MEDITECH as a Service (MaaS), a cloud-based subscription model of the Expanse EHR. This model lowers the barrier to entry for smaller hospitals by reducing capital expenditures and eliminating the need for on-premises infrastructure. Later that year, Humber River Health in Toronto was announced as the inaugural collaborator in the MEDITECH Expanse Innovation Partnership program. This partnership focuses on co-developing next-generation technologies to enhance user experience, clinical decision-making, and operational efficiency.

MEDITECH Expanse offers a fully integrated, mobile-friendly EHR platform that includes inpatient, ambulatory, ED, surgical, and home care modules. Canadian clients benefit from its customizable clinical workflows, bilingual support (English and French), and compliance with local privacy and billing regulations. Expanse also features native population health analytics, patient engagement tools, and clinical surveillance capabilities.

To further support data exchange and continuity of care, MEDITECH launched the Traverse Exchange Canada initiative. This national interoperability program enables connected sharing of patient records across organizations, including hospitals, long-term care, and home health providers. MEDITECH is aligned with pan-Canadian interoperability strategies, offering support for provincial integration frameworks such as Alberta Netcare, Ontario Health Digital Services, and PrescribEIT.

MEDITECH's long-standing commitment to Canadian healthcare is underscored by decades of continuous innovation, regional presence, and collaboration with clinicians and IT leaders. Its ability to serve both small and large enterprises, combined with its shift to scalable cloud models and FHIR-based APIs, reinforces its leadership in the Canadian EHR market.### Epic Systems Epic Systems has established itself as one of the most influential EHR providers in Canada, particularly within large academic medical centers and provincial healthcare systems. From 2015 to 2019, Epic's market share in Canada expanded significantly, growing from a single hospital installation to 134 hospitals, securing its position as the second-largest hospital EHR vendor in the country.

This growth has been driven by major contracts, including Epic's implementation across Alberta Health Services (AHS), one of the largest integrated health systems in North America. AHS adopted Epic as its core clinical and administrative system under the Connect Care initiative, unifying patient records across over 650 facilities. Additionally, Epic is deployed in prestigious Canadian institutions like SickKids in Toronto, CHEO in Ottawa, and the Centre hospitalier universitaire Sainte-Justine in Montreal, which have embraced Epic's platform for its robust capabilities in pediatrics, research integration, and patient engagement.

Epic's offerings are known for deep customization, embedded clinical decision support tools, and advanced patient portal features through MyChart, supporting telehealth, remote monitoring, and multilingual communication. With integrated revenue cycle features, Epic is also used in provincial strategies to reduce duplication of care, improve outcomes, and unify clinical data under one record. Despite the cost and complexity of implementation, Epic's sustained investments in interoperability, analytics, and AI-supported diagnostics continue to make it a strategic platform of choice for many of Canada's high-performing health systems.



## Altera Digital Health

Altera Digital Health, formerly known as Allscripts, has maintained a stable but modest footprint in Canada's hospital EHR sector. As of early 2024, it holds approximately 5.2% of the Canadian hospital EHR market, placing it fourth among vendors. Altera's Sunrise Clinical Manager (SCM) platform continues to be deployed in several Canadian provinces, including longstanding implementations in Alberta and British Columbia.

One of the most visible deployments is within the Fraser Health Authority in British Columbia, which has used Altera's solutions as part of their core hospital information system for more than a decade. The company's open architecture and modular capabilities have made it appealing for Canadian healthcare environments requiring flexible integration with other systems.

Altera has also retained clients by focusing on workflow configurability, legacy system support, and integration with provincial lab and diagnostic imaging repositories. In recent years, however, Altera has faced increased pressure from enterprise-scale systems like Epic and MEDITECH Expanse, prompting greater emphasis on interoperability, care coordination, and patient experience tools.

Since the rebranding to Altera Digital Health following its acquisition by Harris Computer Systems, the vendor has pursued stabilization and modernization strategies within Canada. This includes efforts to transition clients from legacy Allscripts platforms to more integrated and cloud-capable systems. While not actively expanding its footprint, Altera remains embedded in numerous clinical environments, particularly where phased or partial modernization is preferred over complete system replacement.

## Epic Systems

Epic Systems has solidified its status as one of the most prominent EHR vendors in the Canadian hospital market, particularly among provincial healthcare systems and large academic institutions. As of 2024, Epic holds approximately 32% of the Canadian hospital EHR market, making it the second-largest vendor in terms of hospital installations after MEDITECH.

Epic's presence is anchored by its landmark partnership with Alberta Health Services (AHS), which implemented Epic's comprehensive clinical and administrative suite under the Connect Care initiative. This deployment spans over 650 facilities and serves as the backbone for integrated care delivery, advanced analytics, and province-wide care coordination. Connect Care is widely regarded as one of the largest and most ambitious EHR initiatives in North America, showcasing Epic's ability to scale across a fully integrated provincial system.

Beyond Alberta, Epic has also been adopted by leading pediatric and academic hospitals, including SickKids in Toronto, CHEO in Ottawa, and CHU Sainte-Justine in Montreal. These institutions rely on Epic for its pediatric-specific clinical workflows, research integration, and population health capabilities. These deployments also highlight Epic's strength in supporting multi-lingual patient communications, precision medicine, and specialized care environments. The Epic platform offers a unified, enterprise-wide system that includes modules for inpatient, ambulatory, surgical, emergency, behavioral health, radiology, and pharmacy services. It is also recognized for its robust clinical decision support, AI-enhanced diagnostics, and its



flagship MyChart patient portal. MyChart allows patients to access their medical records, manage telehealth appointments, communicate with providers, and utilize real-time remote monitoring features, making it a cornerstone of Epic's digital front door strategy.

Epic's interoperability framework is another core strength, supporting FHIR, HL7, and seamless integration with provincial platforms such as Alberta Netcare, Ontario Health Digital Services, and national e-prescription systems like PrescriberIT. This compliance with Canadian data sharing and privacy standards makes Epic particularly attractive to regional health authorities seeking to unify records across distributed facilities.

Despite the cost and complexity of implementation, Epic remains the platform of choice for many high-performing health systems aiming to consolidate IT infrastructure, streamline workflows, and advance value-based care initiatives. Its strong presence in Canada is further reinforced through long-term innovation partnerships focused on AI, predictive analytics, remote patient management, and enhanced provider-user experiences.

In 2026, Epic continues to grow its Canadian footprint through phased deployments, performance optimization contracts, and its appeal to institutions prioritizing large-scale digital transformation. Its future success will likely hinge on its continued ability to align with federal and provincial policy goals, deliver measurable ROI, and adapt to Canada's evolving health system demands.

## InterSystems

InterSystems is a globally recognized health IT provider, best known for its TrakCare Electronic Health Record (EHR) system, which is widely deployed across 29 countries on five continents. However, as of late 2024, TrakCare has not been adopted by healthcare organizations in Canada. Despite this, InterSystems plays a critical role in Canadian healthcare through its other offerings, particularly the HealthShare interoperability platform and IRIS for Health data platform.

HealthShare is used in Canada to support regional health information exchanges, patient data aggregation, and care coordination infrastructure. Its standards-based design is aligned with national interoperability goals, and it enables real-time access to comprehensive health records across disparate systems. InterSystems' technologies are leveraged by provincial agencies and large health networks to facilitate lab integration, public health reporting, and data warehousing for analytics.

With a proven reputation for reliability, scalability, and HL7/FHIR support, InterSystems is often selected as the data interoperability engine behind existing EHR ecosystems. Canadian healthcare organizations increasingly recognize its potential to serve as the backbone for longitudinal patient records, advanced analytics, and precision medicine efforts.

Although TrakCare has yet to enter the Canadian acute care EHR market, InterSystems' deep involvement in interoperability and data management strategies positions it as an important enabler of Canada's digital health transformation. The company continues to monitor Canadian market demand for enterprise EHR platforms, particularly in niche environments like behavioral health, academic research centers, and data-rich public health settings.

## Logibec

Logibec is a Canadian healthcare technology company with a long-standing presence in the country's hospital and post-acute care IT environment. As of early 2024, Logibec held approximately 2.2% of the Canadian hospital EHR market share, ranking fifth among EHR vendors. Headquartered in Quebec, Logibec provides a suite of integrated software solutions focused on clinical documentation, administrative workflows, human resources, business intelligence, and decision support for healthcare providers.

The company's Electronic Health Record offering is particularly tailored to the needs of Francophone healthcare institutions and long-term care providers. Logibec systems are implemented in a wide range of care settings, including hospitals, rehabilitation centers, long-term care homes, and community service organizations. Some of its clients include Villa Medica and Le Groupe Champlain.

Since its acquisition by private equity firm Novacap in 2020, Logibec has accelerated product modernization efforts, expanded its digital health platform capabilities, and pursued strategic acquisitions. A key move was the 2021 acquisition of QoC Health, a provider of virtual care and remote monitoring solutions. This allowed Logibec to expand its portfolio with tools for patient engagement, remote care delivery, and mobile-first care coordination.

Logibec's strengths lie in providing configurable, modular systems that support public sector procurement and meet the diverse needs of regional health authorities. The company also integrates well with existing provincial registries and information systems, and has recently invested in enhancing its offerings with analytics dashboards, workflow automation, and telehealth readiness.

As the Canadian EHR landscape shifts toward full interoperability and integrated care, Logibec is positioning itself as a digital health partner capable of supporting both clinical operations and administrative efficiency in under-served and specialized markets.

## Purkinje

Purkinje is a Canadian company specializing in healthcare information technology solutions, with a focus on Electronic Health Records (EHR) for hospitals and clinics. Headquartered in Montreal, Purkinje has been serving the Canadian healthcare sector for over 40 years, developing and integrating software solutions tailored to the needs of healthcare professionals. Purkinje's EHR solutions are utilized by various healthcare establishments across Quebec and Canada. The company's deep understanding of the clinical environment and technological expertise have established it as a benchmark in the Canadian healthcare IT sector. Purkinje's primary focus appears to be on serving healthcare organizations within Canada, and there is no substantial evidence to suggest significant growth in its market share on a global scale.

## TELUS Health

TELUS Health holds a significant position in Canada's Electronic Medical Record (EMR)

market, particularly within primary care settings. The company is recognized as one of the leading EMR providers, alongside WELL Health Technologies and QHR Technologies. Collectively, these three companies account for nearly all the EMR market share in most provinces and territories. TELUS Health's solutions include Med Access, PS Suite, Wolf, KinLogix, and Collaborative Health Record (CHR), serving thousands of clinics across Canada.

In the hospital sector, TELUS Health's presence is more modest. As of early 2024, the company held approximately 2.0% of the Canadian hospital EHR market share, ranking seventh among EHR vendors in the country. However, its recent expansion efforts and technological advancements signal its intent to further establish its presence in acute care environments.

TELUS Health has been at the forefront of digital health innovation, investing heavily in AI-powered clinical decision support tools and secure virtual care solutions. Its CHR platform integrates virtual visits, e-referrals, patient intake forms, and remote monitoring tools to improve care coordination and patient access. The platform is also PrescriberT-enabled, allowing for secure electronic prescribing within Canada's national e-prescription framework.

The company's AI integration efforts aim to reduce documentation burdens on physicians, enhance diagnostic accuracy, and support population health initiatives through predictive analytics. TELUS Health's 2025 Drug Trends Report also highlights the growing role it plays in national health data intelligence.

Beyond software, TELUS Health has invested in a broad digital health ecosystem, including virtual pharmacies, telehealth services, digital benefits management, and mental health platforms. This integrated model uniquely positions TELUS Health as more than an EMR vendor—it operates as a comprehensive digital health solutions provider, bridging gaps across public and private sectors.

While the hospital EHR market remains competitive, TELUS Health's consistent innovation and scale in primary care, coupled with its partnerships across provincial governments, position it as a key stakeholder in the broader digitization of Canadian healthcare.

## Harris Healthcare

Harris Healthcare, a division of N. Harris Computer Corporation, offers the Harris Flex EHR system along with other health IT solutions tailored for the needs of Canadian hospitals and healthcare organizations. As of 2024, Harris holds approximately 1.6% of the Canadian hospital EHR market, signifying a modest yet stable presence.

Harris Flex is designed to support both clinical and administrative processes, focusing on documentation workflows, medication management, diagnostic results integration, and patient record tracking. The platform is particularly suited for regional hospitals and healthcare institutions that require reliable functionality and modular implementation capabilities.

Harris Healthcare's strategy in Canada has centered on maintaining long-term client relationships and offering high-touch support and localized configuration. The vendor benefits from deep integration with public sector initiatives and has a track record of supporting data

standards required by provincial health authorities.

The company has also invested in modernizing its product suite to include cloud deployment options, FHIR compatibility, and secure interoperability with labs, pharmacies, and provincial information exchanges. With its parent company's growing portfolio of health technology firms, Harris has access to shared resources and R&D initiatives that enhance its adaptability in a changing regulatory and digital health landscape.

### **Veradigm**

Veradigm, formerly a part of Allscripts, holds approximately 0.7% of the Canadian hospital EHR market as of early 2024. While its hospital EHR footprint in Canada remains limited, Veradigm's strengths lie in its focus on health analytics, population health tools, and outpatient care solutions.

Canadian healthcare organizations primarily leverage Veradigm technologies for analytics-driven decision support, chronic disease management, and quality performance reporting. These tools are increasingly valuable as providers align their operations with value-based care principles and population health initiatives.

Veradigm's interoperability capabilities, powered by its API-first architecture and support for FHIR, have allowed it to maintain integrations within broader hospital and ambulatory systems. The company has collaborated with Canadian physician groups and specialty practices to implement tools for electronic prescribing, registries, and patient engagement.

Although it does not currently compete at scale with enterprise EHR platforms in Canadian hospitals, Veradigm's evolution from a clinical documentation provider to a data-driven digital health company positions it well in the analytics and population health segments of the Canadian market.

### **OpenText, Ricoh Canada, and FileHold**

OpenText, a Canadian company specializing in information management solutions, does not offer a proprietary Electronic Health Record (EHR) system. Instead, it provides complementary technologies that enhance existing EHR systems used by healthcare organizations. Ricoh Canada and FileHold also support EHR infrastructure with document management, workflow optimization, and information security services, though none of them hold a direct market share in the Canadian EHR sector.

### **QHR Technologies**

QHR Technologies' Accuro EMR holds a significant position in Canada's Electronic Medical Record (EMR) market. As of 2021, Accuro EMR was utilized by approximately 17% of Canadian physicians, making it one of the leading EMR systems in the country. Recent improvements include a refreshed user interface and the integration of AI tools, streamlining administrative and clinical processes.

### **InputHealth**



InputHealth, a Canadian company specializing in healthcare technology, offers the Collaborative Health Record (CHR) platform. As of June 2020, InputHealth served over 2,000 healthcare providers across Canada, the United States, New Zealand, and Australia. However, specific data regarding InputHealth's market share within the Canadian Electronic Health Record (EHR) sector is not publicly available. The Canadian EHR market is competitive, with major vendors like TELUS Health, QHR Technologies, and WELL Health Technologies holding significant portions. InputHealth's CHR platform is recognized for its patient engagement features and cloud-based design, contributing to its adoption among healthcare providers.

### **WELL Health Technologies**

WELL Health Technologies' OSCAR Pro is a prominent Electronic Medical Record (EMR) platform in Canada. As of 2021, WELL Health's EMR services were utilized by over 3,200 clinics and more than 10,000 physicians across the country. In the first quarter of 2024, WELL achieved record quarterly revenue of \$231.6 million, a 37% increase compared to the same period in 2023. This growth was driven by both acquisitions and organic expansion, including the addition of new clinics and healthcare providers. Additionally, WELL reported a record 1.3 million patient visits in Q1 2024, a 34% increase from the previous year, indicating a growing number of clients utilizing their services.

### **Intrahealth**

Intrahealth, a subsidiary of HEALWELL AI Inc., is an enterprise-class Electronic Health Record (EHR) provider supporting approximately 20,000 healthcare providers and the care delivery of tens of millions of patients across Canada, Australia, and New Zealand. In Canada, Intrahealth has been strengthening its presence, particularly in the Ontario Public Health sector, where it has deployed the most EHR systems among public health units across the province. While specific market share percentages are not publicly disclosed, Intrahealth's active engagement in the Canadian healthcare market indicates a notable presence in the country's EHR landscape.

This unified vendor overview reflects Canada's dynamic and evolving EHR ecosystem—one characterized by ongoing digital transformation, technological innovation, and a growing emphasis on interoperability and patient-centered care.

## CANADA: Q2 2025

# The State of Healthcare Information Technology & Electronic Health Records

### 2025 EHR STATUS: CANADA

As of 2025, electronic health record (EHR) adoption among Canadian physician offices has surpassed 95%, signaling near-universal utilization of digital healthcare systems. Despite this widespread adoption, Canada continues to grapple with significant fragmentation resulting from approximately 20 distinct EHR platforms operating across the nation. Additionally, many vendors provide multiple system versions, further complicating interoperability and impeding seamless communication among healthcare providers. This fragmentation remains a primary challenge, creating gaps in care continuity, operational inefficiencies, and incomplete patient records.

Looking forward to 2026, industry stakeholders, including healthcare providers, regulatory bodies, and technology vendors, are increasingly prioritizing interoperability and consolidation initiatives. Efforts to standardize data formats, enhance APIs, and implement unified integration standards are anticipated to accelerate. Provincial and territorial health authorities are expected to place greater emphasis on incentives or regulatory frameworks aimed at encouraging consolidation around fewer EHR platforms, thereby significantly improving data sharing capabilities and reducing complexity for healthcare providers.

Canada's interoperable EHR (iEHR) initiatives remain central to its digital health strategy. As of 2024, interoperable systems have been implemented with varying degrees of maturity across all provinces and territories, aiming to enhance secure, real-time patient data sharing. From 2025 through 2026, provincial healthcare authorities will likely move from mere implementation towards intensive optimization of these systems. This shift includes refining system functionalities, improving user experiences for clinicians, and expanding the scope of data shared—including social determinants of health and patient-generated data—thereby deepening the impact of iEHRs on clinical decision-making and care coordination.

Canada Health Infoway continues to lead national efforts to promote digital health solutions, including EHR optimization and data interoperability initiatives. Over the next two years, the organization is expected to drive significant investment in projects designed to improve data governance, privacy standards, and cybersecurity. Infoway's focus will also

extend toward enhancing digital literacy among healthcare professionals and patients, facilitating more widespread and effective use of digital tools.

By early 2025, more than 310,000 healthcare professionals, including physicians, nurses, pharmacists, and allied health staff, have electronic access to comprehensive patient information, such as medication records, diagnostic results, and patient histories, through provincial and territorial systems. This expansion in digital access will accelerate through 2026, driven by continued investments in cloud-based solutions and mobile health technologies, enabling providers to access critical patient information securely from virtually any location.

Vendor dynamics are evolving rapidly. By the end of 2025:

- Meditech continues as a prominent EHR vendor, supporting 170 healthcare facilities through ongoing Expanse platform upgrades and enhancements.
- Epic Systems is projected to further solidify its market presence, reaching approximately 140 hospitals by leveraging its comprehensive integration capabilities and advanced analytics tools.
- Oracle Health, following its significant Nova Scotia contract win, continues strategic expansion and deepens provincial partnerships, aiming to increase its footprint beyond the current 54 installations.
- Altera Digital Health maintains stability with installations in 24 hospitals, focusing on niche capabilities and custom solutions tailored to specific provider requirements.
- InterSystems and Logibec are strengthening their market positions through specialized interoperability solutions and robust data analytics offerings, emphasizing improved clinical outcomes and operational efficiencies across healthcare institutions.

Canada's ongoing efforts reflect global trends toward optimizing EHR systems to enhance patient outcomes, improve chronic disease management, and streamline healthcare operations. By leveraging comprehensive, interoperable health records, Canadian healthcare stakeholders are better equipped to make informed strategic decisions, enhance quality metrics, and ultimately deliver higher standards of patient care through 2026 and beyond.

## 2025 MARKET DYNAMICS: CANADA

Income remains a critical determinant of health in Canada, with persistent and widening income inequalities exacerbating healthcare access disparities into Q2 2025. This issue disproportionately affects rural communities, where approximately 19% of Canadians reside, yet only 8% of physicians practice. This imbalance results in significant gaps in healthcare service access, leading to poorer health outcomes. Recent studies continue to highlight notably higher mortality rates following acute conditions such as strokes in rural regions compared to urban centers and the national average.

In 2025, the Canadian healthcare system remains challenged by inconsistencies in patient experiences and access, particularly concerning digital health solutions. Canadians continue to face obstacles in accessing online appointments, test results, and virtual consultations. Persistent privacy concerns and fragmented healthcare data management—where data remains dispersed across isolated provider systems—amplify these difficulties. Consequently, patients frequently experience repeated data entry requirements, inefficiencies, and frustration, often resorting to independent internet searches to manage health information in the absence of user-friendly, centralized platforms. Additionally, Canada still lacks a robust framework to systematically measure and enhance consumer satisfaction related to healthcare data access, limiting overall transparency and accountability.

Rising costs, escalating prevalence of chronic diseases, and enduringly long wait times remain central challenges facing Canada's healthcare system through mid-2025. Governmental efforts persist in implementing cost-control measures, including negotiating lower pharmaceutical prices, imposing mandatory global budgets on regional health authorities and hospitals, and maintaining constraints on sector resources and investments.

Despite consistently high healthcare spending, Canada's performance compared to OECD nations remains relatively low, particularly in terms of wait times, availability of providers, and access to dental care. By 2024, healthcare spending accounted for approximately 12.8% of Canada's GDP, maintaining its position significantly above the OECD average. This heightened expenditure is influenced by ongoing recovery efforts from the COVID-19 pandemic.

The high public investment in healthcare delivery has amplified Canadians' eagerness for digital health innovations that address inefficiencies and enhance patient outcomes. Digital health solutions promise substantial improvements in healthcare accessibility and portability—crucial components outlined by the Canada Health Act. Continued investment and integration of remote service capabilities and enhanced portability of health data



across provinces could significantly improve the overall patient experience, aligning closely with the Canada Health Act's principles.

The Canada Health Act, which outlines five national healthcare principles—Public Administration, Accessibility, Comprehensiveness, Universality, and Portability—remains foundational to healthcare policy. Moving forward in 2025–2026, achieving a truly consumer-driven healthcare system that ensures equitable access requires urgent action. -Crucially, federal leadership in formulating a comprehensive national digital health strategy is necessary. Such a strategy would establish clear guidelines for adopting digital solutions, including virtual and remote healthcare services, and address existing fee structures that inadequately incentivize remote healthcare delivery. Without proactive federal policy changes, the pace of digital health adoption risks continued sluggishness, delaying tangible enhancements in healthcare delivery and patient satisfaction.

## 2025 -2026 MARKET CONSTRAINTS: CANADA

Addressing key challenges at national, provincial, and territorial policy levels is essential to fully integrate digital health tools into Canada's healthcare system. A persistent barrier remains the structural bias inherent in fee-for-service models, which often incentivizes healthcare provider activity over patient-centered outcomes. This bias contributes to continued negative patient experiences, including prolonged wait times, gaps in communication, and patient frustration due to uncertainties surrounding test results, appointment scheduling, and care coordination.

Another significant constraint through 2025–2026 is the inconsistent compensation framework for physicians providing virtual care. Current compensation models inadequately reimburse healthcare professionals for virtual visits, online portal engagement, and remote patient consultations. This lack of financial incentive significantly limits widespread adoption and optimization of digital health services. A notable opportunity exists to enhance digital healthcare integration if policies effectively incentivize and equitably compensate healthcare providers for virtual and remote services, particularly benefiting underserved rural regions.

Despite substantial investments into electronic health records (EHRs), data sharing across Canada's healthcare landscape remains fragmented due to persistent interoperability challenges. Diverse and incompatible EHR systems across provinces and territories continue to result in incomplete patient records, hampering clinical efficiency and care quality. Addressing this issue by reducing the number of EHR platforms in use and standardizing data-sharing practices presents a crucial opportunity for enhancing healthcare outcomes and streamlining provider workflows.

Canadians maintain deep pride in their publicly funded healthcare system, a cornerstone of national identity. To advance effectively into 2026, national cohesion and proactive federal leadership are critical for aligning digital health initiatives with the core principles of the Canada Health Act—portability and accessibility. A robust national digital health strategy, clearly articulating policies for digital adoption, interoperability, privacy, and reimbursement frameworks, is urgently needed. Such a strategy will ensure a consistent, equitable transition towards a more connected and patient-centric healthcare system, ultimately benefiting all Canadians regardless of geographic location or socioeconomic status.

## 2026 MARKET OPPORTUNITIES: CANADA'S DIGITAL HEALTH ADVANCEMENT

Canada's journey toward a fully patient- and family-centric healthcare system is gaining momentum, driven by a convergence of consumer adoption, digital innovation, and policy reform. In 2026, several high-impact opportunities are emerging to reshape care delivery, expand access, and accelerate the integration of virtual and data-enabled services nationwide.

### Expanding the Value of Wearable and Consumer Health Data

As of 2026, nearly 91% of Canadian consumers report willingness to share health data from wearables, mobile apps, and personal health tracking devices with their healthcare providers—up from 90% in 2025. Additionally, over 50% of Canadians are now sharing this data with online communities, a sharp increase from 38% in 2016. This signals a growing societal comfort with digital health engagement and the normalization of participatory care models.

Healthcare systems and providers can unlock major value by integrating this real-time, patient-generated data into clinical workflows. To do so, advanced analytics platforms and interoperable EHRs must evolve to contextualize this data into actionable insights. Federal and provincial governments are urged to prioritize incentives and reimbursement models that support physician use of wearable and remote monitoring data in both in-person and virtual settings.

### Digital Access and Virtual Care Reimbursement Reform

While digital engagement is rising—with 40% of Canadians actively accessing their electronic health records (EHRs) as of early 2026—fragmented policies continue to hinder the scalability of virtual care. Provinces like British Columbia, Alberta, and Ontario have made progress in aligning physician compensation with digital modalities (e.g., e-visits, asynchronous messaging, remote consults), but Canada lacks a standardized national billing framework.

Achieving equitable and sustainable digital care delivery will require:

- A unified virtual care compensation model across provinces
- Reimbursement parity for digital-first and hybrid care models
- Federal-provincial agreements on cross-jurisdictional licensure and documentation standards

National alignment will unlock broader patient access and physician participation in virtual care ecosystems, particularly in underserved and rural communities.

### **Cloud-Based Platforms and Modern Health Data Infrastructure**

Cloud technology adoption has accelerated across Canada's healthcare sector in response to surging data volumes, AI/ML deployments, and virtual service demands. In 2026, cloud-native platforms are enabling real-time clinical decision support, precision public health surveillance, and seamless provider collaboration.

The shift to secure, Canadian-compliant cloud infrastructure—including domestic data centers built by global tech firms—has alleviated previous data residency concerns. Policymakers must now focus on:

- A national cloud policy framework that ensures standardization across jurisdictions
- Updated privacy and cybersecurity protocols adapted to hybrid and multi-cloud environments
- Strategic partnerships to future-proof infrastructure for AI, IoT, and 5G-enabled care delivery

Cloud platforms will be instrumental in supporting value-based care models, population health initiatives, and longitudinal patient record access.

### **Interoperability and EMR System Standardization**

One of the most persistent challenges in Canada remains the fragmentation of EMR and EHR systems across provinces and territories. Despite decades of investment in digital health, provincial silos and limited data exchange have constrained continuity of care and undermined efficiency.

To address this, 2026 presents a critical opportunity to:

- Implement national interoperability standards anchored in FHIR (Fast Healthcare Interoperability Resources)
- Establish a pan-Canadian health information exchange (HIE) strategy
- Incentivize vendors to open APIs and participate in secure data-sharing networks

Modernizing interoperability frameworks is essential not only for care coordination but also for scaling AI-powered diagnostics, personalized medicine, and outcome-based reimbursement models.

---



# Black Book Research Methodology

## Black Book Research Methodology and Canadian Market Context (2025)

---

### Data Collection and Survey Integrity

Black Book Research conducts independent, unbiased surveys, with no financial influence, commissions, or subscriptions permitted from evaluated vendors. Vendors cannot pay for placements or influence ratings in any manner. Ratings derive exclusively from verified feedback from actual healthcare IT users across Canada, providing fair and impartial assessments.

Surveys encompass 18 key performance indicators (KPIs) relating to operational excellence. Each survey response undergoes rigorous internal and external audits to validate accuracy, completeness, and authenticity while safeguarding respondent confidentiality. Every data set is carefully reviewed by Black Book executives and verified independently by at least two additional auditors, ensuring robust transparency and data reliability.

These 18 performance criteria are segmented by industry sector, market size, geographic region, and technology specialization, facilitating targeted, actionable insights. Specialized studies are also conducted in critical areas such as electronic prescribing, health information exchange, accountable care organizations (ACOs), hospital software, healthcare service providers, e-health educational platforms, and benchmarking. Each focused survey includes between four and 20 customized questions designed to deliver in-depth insights specific to each niche.

---

### Respondent Network and Validation Process

Black Book surveys an extensive network of over 2.5 million healthcare professionals, including hospital executives, clinicians, IT specialists, and frontline staff, ensuring comprehensive representation from all operational levels. Participants receive no compensation; however, upon verification of contact and employment details, respondents gain complimentary access to selected proprietary Black Book Research reports as acknowledgment of their valuable input.

Black Book maintains rigorous data validation and auditing procedures. Respondent identities are authenticated using corporate email addresses and unique professional profiles. Strict measures prevent duplicate responses by allowing only a single ballot submission per respondent annually. Respondent details undergo yearly external revalidation at Black Book's expense to ensure database accuracy.

Independent external verification agencies support Black Book's rigorous validation processes, cross-checking IP addresses, email accounts, employers, geographic

locations, and eliminating duplicate or fraudulent responses. These meticulous measures uphold the impartiality and reliability of Black Book's healthcare technology insights.

---

## Statistical Significance and Confidence Levels

---

Performance rating reliability in Black Book surveys hinges on sufficient participation levels from healthcare organizations using electronic health record (EHR) systems. To ensure statistical robustness:

- **Minimum Sample Size Requirements:**
  - Vendors require at least 10 unique client evaluations to be ranked within Top 10 categories. Broader industry categories necessitate at least 20 unique client responses to achieve statistical validity.
- Data indicated with an asterisk (\*) denotes a smaller sample size used solely for trend analysis, not ranking purposes, and carries a higher margin of error until more responses are collected.
- **Confidence Levels Related to Sample Size:**
  - Vendors with over 20 unique client responses exhibit high statistical confidence and reduced variability in scores. Greater respondent numbers correlate directly to increased precision and reliability in reported performance ratings.
- **Transparency and Raw Data Reporting:**
  - Black Book provides comprehensive transparency by detailing the total completed surveys and number of unique participating organizations. This enables stakeholders to clearly assess data robustness and reliability of vendor performance metrics.

○

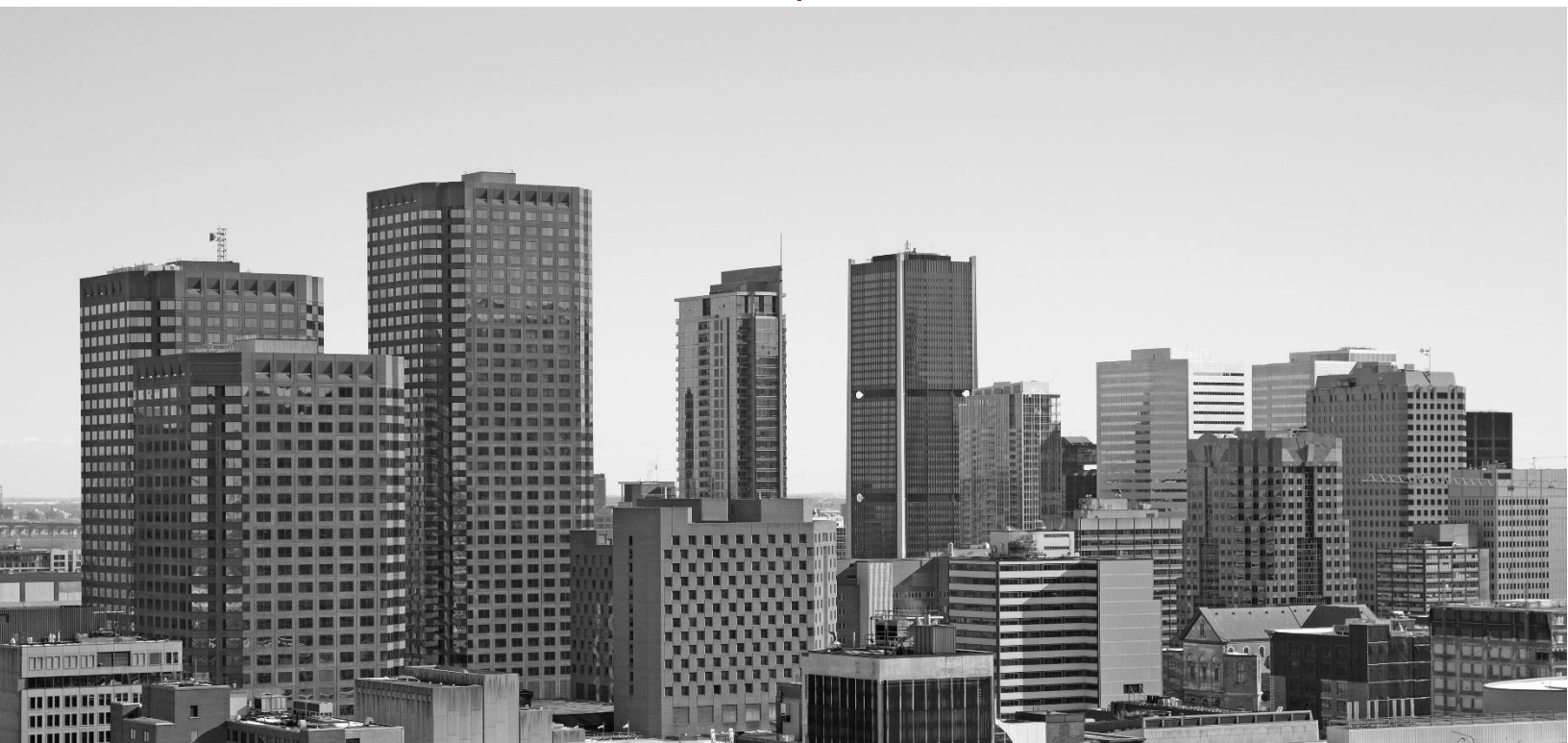
## Canadian EHR Market Overview (2025)

---

In 2026, Black Book received validated feedback from **958 qualified IT leaders** across Canadian healthcare systems, significantly strengthening the statistical confidence and applicability of survey findings. Canada's healthcare landscape now includes approximately **175,000 active EHR users across hospitals**, reflecting substantial adoption and engagement. These figures underscore the importance of Black Book's data-driven insights for Canadian healthcare organizations, policymakers, and vendors navigating the rapidly evolving digital healthcare ecosystem.

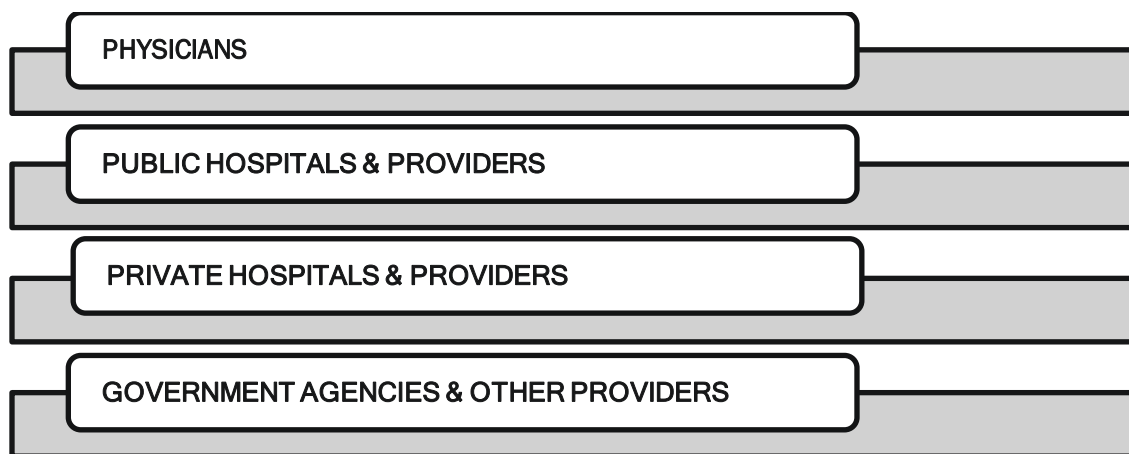
---

The statistical confidence in these survey results is estimated to be at a 95% confidence level, given the robust sample size and rigorous validation procedures implemented. The confidence level in the 2026 Black Book Research survey results is high, owing to the comprehensive and meticulous data collection and validation procedures undertaken. With validated input from 958 qualified IT leaders, surpassing minimum statistical thresholds for reliability, the results demonstrate low variability and high precision. These stringent methodologies—including multi-tiered audits, external verification, respondent revalidation, and transparency in raw data reporting—collectively ensure that the insights provided are robust, reliable, and representative of the broader Canadian healthcare IT landscape. This high level of confidence implies there is a 95% likelihood that the findings accurately reflect the performance ratings within the Canadian EHR market.



# Guide: Understanding Chart Color Coding and Table Layouts

## Functional Subsets of Respondent Groups





## Key to Raw Scores

0.00–5.79 ►	◀ 5.80–7.32 ►	◀ 7.33–8.70 ►	◀ 8.71–10.00
Deal Breaking Dissatisfaction	Neutral	Satisfactory Performance	Overwhelming Satisfaction
Does Not Meet Expectations	Meets/Does Not Meet Expectations Consistently	Meets Expectations	Exceeds Expectations
Cannot Recommend Vendor	Would Not Likely Recommend Vendor	Recommends Vendor	Highly Recommended Vendor
Source: Black Book Research™			

## Stoplight Scoring Key

Green	(Top 10%) scores better than 90% of Vendors. Green coded vendors have received constantly the highest client satisfaction scores.	8.71+
Clear	(Top 33%) scores better than 67% of Vendors. Well-scored vendors which have the middle of the pack results.	7.33 to 8.70
Yellow	Scores better than half of Vendors. Cautionary performance scores, areas of improvement required.	5.80 to 7.32
Red	Scores were worse than 66% of Vendors. Poor performance reported potential cause for service and contractual cancellations.	Less than 5.79

## Raw Score Compilation and Scale of Reference

Black Book Raw Score Scales	
0 = Deal Breaking Dissatisfaction	◀ — ▶ 10 = Exceeds All Expectations
Source: Black Book Research™	

Individual vendors can be assessed based on specific indicators related to electronic health records and related tech functions, as well as within grouped and summarized subsets. Each subset includes detailed information, allowing for an in-depth analysis of vendors by specific functions and their overall performance in delivering superior client experience.

## Scoring Key

Overall Rank	Q1 Criteria Rank	Contract Services Company	Physicians	Public Hospitals	Private Hospitals	Government Agencies & Others	Mean
5	1	Vendor	7.02	9.49	5.33	8.35	7.26

Source: Black Book Research™

- **Overall Rank** – this rank references the final position of all 18 criteria averaged by the mean score collectively. This vendor ranked fifth of the 20 competitors.
- **Criteria Rank** – refers to the number of the question or criteria surveyed. This is the first question of the 18 criteria of which this vendor ranked first of the 20 vendors analyzed positioned only on this particular criteria or question. Each vendor required ten unique client ballots validated to be included in the top ten ranks.
- **Company** – name of the vendor or parent corporation/investor.
- **Subsections** – each subset comprises one-fourth of the total vendor mean at the end of this row and includes all buyers and users who indicate that they contract each respective functional subsection with the supplier, specific to their enterprise.
- **Mean** – congruent with the criteria rank, the mean is a calculation of all four subsets of functions surveyed. As a final ranking reference, it includes all market sizes, specialties, delivery sites and geographies.



# Overall KPI Leaders: Canada

## Summary of Criteria Outcomes

Overall Rank	Vendor	Total Number One Criteria Ratings
1	ORACLE HEALTH	10
2	MEDITECH	5
3	ALTERA	3
NOT RATED*		
-	EPIC SYSTEMS	0
-	LOGIBEC	0
-	TELUS	0
-	INTERSYSTEMS	0

Source: Black Book™ Q2 2025  
\* Vendor received less than 20 unique and validated client ratings in 2024.

Top 3 Client- Rated Vendors Summary: All Segments

Table 2: Top Score per Individual Criteria by Segment

Criteria	TOP EHR VENDOR	MEAN OF ALL VENDORS
Strategic Alignment Between Vendor and Client Goals	ORACLE HEALTH	1
Innovation and Optimization	ORACLE HEALTH	1
Training	ALTERA	3
Client Relationships and Cultural Fit	MEDITECH	2
Trust, Accountability, Ethics a-nd Transparency	ORACLE HEALTH	1
Breadth of Offerings, Client Types, Delivery Excellence	MEDITECH	2
Deployment and Implementation	ORACLE HEALTH	1
Customization	ALTERA	3
Integration and Interfaces	ORACLE HEALTH	1
Scalability, Client Adaptability, Flexible Pricing	ALTERA	3
Staff Expertise, Compensation and Performance	ORACLE HEALTH	1
Reliability	MEDITECH	2
Brand Integrity and Marketing Leadership & Communications	MEDITECH	2
Value Adds and Economies of Scale	ORACLE HEALTH	1
Financial Viability & Managerial Stability	ORACLE HEALTH	1
Data Security, Patient Privacy and Backup Services	MEDITECH	2
Support and Customer Care	ORACLE HEALTH	1





# Individual EHR Key Performance Indicators

## Q2 2025

## CANADA



## KPI Strategic Alignment between Vendor & Client Goals

The organizational structure is designed to align with stakeholders and customer needs, with their satisfaction as the top priority. As a result, clients are highly inclined to recommend the vendor to organizations of similar size and profile.

Table 4 - Q1: KPI: Strategic Alignment between Vendor and Client Goals

Overall Rank	Q1 Criteria Rank	Vendor	Public Hospitals	Private Hospitals	Government & Public Health Agencies	Physicians & Medical Providers	Mean
1	1	ORACLE CERNER	9.65	9.49	9.83	9.83	9.70
3	2	MEDITECH	9.53	9.80	9.55	8.24	9.28
2	3	ALTERA	9.24	9.39	9.87	8.33	9.21

Source: Black Book Research™ 2025

## KPI: Innovation and Optimization

Clients consistently seek further enhancements, and the vendor remains highly responsive to these evolving needs. Customers report that the vendor's technology not only improves business and care management but also streamlines accurate record-keeping and reimbursement processes, while significantly reducing overhead costs—achievements previously unattainable before implementing the vendor's solutions. The vendor is proactive in incorporating client feedback, driving continuous innovation with state-of-the-art improvements.

Table 5 - Q2: KPI: Innovation and Optimization

Overall Rank	Q2 Criteria Rank	Vendor	Public Hospitals	Private Hospitals	Government & Public Health Agencies	Physicians & Medical Providers	Mean
1	1	ORACLE HEALTH	9.22	9.73	8.54	9.03	9.13
2	2	MEDITECH	9.41	9.24	7.10	7.82	8.38
3	3	ALTERA	8.42	8.78	6.90	8.05	8.04

Source: Black Book Research™ 2025

## KPI: Training

The vendor's leadership is committed to offering robust and impactful training programs for both internal teams and client staff. They prioritize the professional growth of technology specialists, client service representatives, and customer support consultants. Training modules are designed to be practical and efficient, ensuring that clients require minimal additional training post-implementation, whether on-site or remotely.

Table 6 - Q3: KPI: Training

Overall Rank	Q3 Criteria Rank	Vendor	Public Hospitals	Private Hospitals	Government & Public Health Agencies	Physicians & Medical Providers	Mean
3	1	ALTERA	8.01	8.83	9.59	8.04	8.62
2	2	MEDITECH	8.39	8.70	9.10	7.45	8.39
1	3	ORACLE HEALTH	8.39	8.22	8.49	8.09	8.30

Source: Black Book Research™ 2025

## KPI: Client Relationships and Cultural Fit

The vendor's leadership places a strong emphasis on nurturing customer relationships, enhancing the client's reputation through their partnership. Improving operational efficiency and effectiveness in healthcare delivery remains a core priority. The engagement process is straightforward for clients, requiring minimal oversight or intervention. Relationships are characterized by consistent transparency and quality, free from cultural mismatches or conflicts that could compromise client satisfaction.

Table 7 - Q4: KPI: Client Relationships and Cultural Fit

Overall Rank	Q4 Criteria Rank	Vendor	Public Hospitals	Private Hospitals	Government & Public Health Agencies	Physicians & Medical Providers	Mean
2	1	MEDITECH	9.53	9.15	9.62	9.40	9.43
1	2	ORACLE HEALTH	8.99	9.19	8.72	8.35	8.81
3	3	ALTERA	9.28	9.34	8.21	8.10	8.73

Source: Black Book Research™ 2025

## KPI: Trust, Accountability, Ethics and Transparency

Clients and prospects place a high value on trust in the vendor's enterprise reputation. Clients are confident that the vendor has the right people, processes, and resources to consistently deliver on promised outcomes, drawing on a proven track record and strong industry standing.

Table 8 - Q5: KPI: Trust, Accountability, Ethics and Transparency

Overall Rank	Q5 Criteria Rank	Vendor	Public Hospitals	Private Hospitals	Government & Public Health Agencies	Physicians & Medical Providers	Mean
1	1	ORACLE HEALTH	9.82	9.66	9.22	9.42	9.53
2	2	MEDITECH	8.79	8.72	7.79	9.24	8.64
3	3	ALTERA	8.09	8.98	7.48	9.61	8.54

Source: Black Book Research™ 2025

## KPI: Breadth of Offerings, Varied Client Settings, Delivery Excellence across All User Types

The vendor delivers industry-recognized functionality, specialized vertical applications, and comprehensive managed services. Their solutions consistently drive measurable improvements in operational performance within their areas of impact. The vendor's offerings are tailored to align with the specific objectives of clients, providing robust contract management systems with a wide range of integrated modules and services designed to support diverse business initiatives.

Table 9 - Q6: KPI: Breadth of Offerings, Varied Client Settings, Delivery Excellence

Overall Rank	Q6 Criteria Rank	Vendor	Public Hospitals	Private Hospitals	Government & Public Health Agencies	Physicians & Medical Providers	Mean
2	1	MEDITECH	9.28	9.83	9.42	9.44	9.49
1	2	ORACLE HEALTH	8.87	8.88	8.59	9.13	8.87
3	3	ALTERA	8.45	8.06	8.10	9.65	8.57

Source: Black Book Research™ 2025

## KPI: Deployment and Implementation

The vendor ensures deployment at a pace that aligns with client expectations, minimizing the need for extensive oversight. Implementation challenges—whether technical, organizational, or cultural—are resolved promptly and professionally. The vendor consistently meets standard timelines while remaining adaptable to clients' unique circumstances, ensuring a smooth and efficient rollout without unnecessary delays.

Table 10 - Q7: KPI: Deployment and Implementation

Overall Rank	Q7 Criteria Rank	Vendor	Public Hospitals	Private Hospitals	Government & Public Health Agencies	Physicians & Medical Providers	Mean
1	1	ORACLE HEALTH	9.51	9.61	9.33	9.55	9.50
3	2	MEDITECH	8.64	8.75	7.84	8.42	8.41
2	3	ALTERA	8.88	8.51	8.64	6.91	8.24

Source: Black Book Research™ 2025

## KPI: Customization

The vendor's solutions and services are meticulously tailored to align with each client's unique objectives, processes, and care delivery models. Adjusting performance metrics to accommodate changing client needs is seamless, encountering minimal resistance. The vendor goes above and beyond to transform client-specific requirements into practical solutions, all while optimizing cost and time efficiency. The platform is highly adaptable, allowing for modifications that are both cost-effective and straightforward.

Table 11 - Q8: KPI: Customization

Overall Rank	Q8 Criteria Rank	Vendor	Public Hospitals	Private Hospitals	Government & Public Health Agencies	Physicians & Medical Providers	Mean
3	1	ALTERA	8.89	8.92	8.83	9.72	9.09
1	2	ORACLE HEALTH	9.22	9.33	8.91	8.22	8.92
2	3	MEDITECH	8.26	9.10	8.16	8.59	8.53

Source: Black Book Research™ 2025

## KPI: Integration and Interfaces

The vendor's solutions support robust interfaces that enable seamless information sharing across necessary applications. The platform is designed for smooth integration with existing backend systems and Health Information Exchanges (HIE), ensuring compatibility with legacy applications when needed. Integration efforts are executed with precision, facilitating effective communication among provider groups and ancillary systems. The vendor prioritizes true interoperability, ensuring that systems connect effortlessly with other healthcare organizations for optimal functionality.

Table 12 - Q9: KPI: Integration and Interfaces

Overall Rank	Q9 Criteria Rank	Vendor	Public Hospitals	Private Hospitals	Government & Public Health Agencies	Physicians & Medical Providers	Mean
1	1	ORACLE HEALTH	8.88	9.51	8.71	9.14	9.06
2	2	MEDITECH	9.17	9.15	8.75	9.10	9.04
3	3	ALTERA	8.73	8.86	7.66	8.40	8.41

Source: Black Book Research™ 2025

## KPI: Scalability, Client Adaptability, Flexible Pricing

The vendor offers flexible, transparent pricing models, enabling clients to select and pay only for the specific functionalities and services they require. With substantial investment in infrastructure, the vendor is well-equipped to support large-scale enterprise clients. Their managed products and services adapt seamlessly to evolving customer needs. Pricing remains stable and predictable, aligning with client budgets without unexpected changes.

Table 13 - Q10: KPI: Scalability, Client Adaptability, Flexible Pricing

Overall Rank	Q10 Criteria Rank	Vendor	Public Hospitals	Private Hospitals	Government & Public Health Agencies	Physicians & Medical Providers	Mean
3	1	ALTERA	9.72	9.87	9.18	9.29	9.52
1	2	ORACLE HEALTH	9.32	9.37	8.37	9.77	9.21
2	3	MEDITECH	7.91	9.50	9.85	8.68	8.99

Source: Black Book Research™ 2025



## KPI: Staff Expertise, Compensation, and Employee Performance

The vendor is widely recognized for its highly skilled and professional team, consistently attracting and retaining top talent. The organization prioritizes building a high-performing workforce, where employees demonstrate ownership and leadership in their roles. A strong emphasis is placed on aligning compensation with performance, with a move toward leveraged pay across all levels.

Table 14 - Q11: KPI: Staff Expertise, Compensation, and Employee Performance

Overall Rank	Q11 Criteria Rank	Vendor	Public Hospitals	Private Hospitals	Government & Public Health Agencies	Physicians & Medical Providers	Mean
1	1	ORACLE HEALTH	9.47	9.12	8.22	8.94	8.94
3	2	ALTERA	9.14	9.36	8.46	8.41	8.84
2	3	MEDITECH	8.93	9.09	8.28	8.02	8.58

Source: Black Book Research™ 2025

## KPI: Reliability

The vendor consistently fulfills agreed-upon service terms, demonstrated by regular service-level reporting that meets or exceeds industry standards. Their comprehensive range of applications and solutions effectively addresses client needs, ensuring maximum service reliability with minimal outages or downtime.

Table 15 - Q12: KPI: Reliability

Overall Rank	Q11 Criteria Rank	Vendor	Public Hospitals	Private Hospitals	Government & Public Health Agencies	Physicians & Medical Providers	Mean
2	1	MEDITECH	9.80	9.79	9.85	8.17	9.40
1	2	ORACLE HEALTH	9.68	9.38	8.92	9.58	9.39
3	3	ALTERA	9.05	8.86	6.90	9.77	8.65

Source: Black Book Research™ 2025

## KPI: Brand Integrity and Marketing Leadership and Communications

The vendor's marketing and sales communications are consistently aligned with actual product and service deliverables, ensuring clients receive exactly what is promised. The company maintains a reputation that reflects its top-tier rankings in software and services. Sales proposals are reliably fulfilled, with a strong emphasis on corporate integrity and transparency in all business development activities.

Table 16 - Q13: KPI: Brand Integrity and Marketing Leadership and Communications

Overall Rank	Q12 Criteria Rank	Vendor	Public Hospitals	Private Hospitals	Government & Public Health Agencies	Physicians & Medical Providers	Mean
2	1	MEDITECH	9.09	9.72	9.65	9.67	9.53
1	2	ORACLE HEALTH	9.33	9.88	9.05	9.64	9.48
3	3	ALTERA	9.04	9.05	8.63	9.46	9.05

Source: Black Book Research™ 2025

## KPI: Value Adds and Economies of Scale

The vendor consistently delivers on promised cost savings, accurately aligning with initial estimates without over-promising or misrepresenting projections, thereby ensuring client satisfaction. As a strategic partner, the vendor actively supports cost management through innovative programs, bundled solutions, and value-added services. These initiatives not only optimize costs but also unlock true business transformation.

Table 17 - Q14: KPI: Value Adds and Economies of Scale

Overall Rank	Q13 Criteria Rank	Vendor	Public Hospitals	Private Hospitals	Government & Public Health Agencies	Physicians & Medical Providers	Mean
1	1	ORACLE HEALTH	9.71	9.64	9.43	9.66	9.61
3	2	ALTERA	8.36	7.26	9.54	8.58	8.44
2	3	MEDITECH	7.31	7.87	6.33	6.94	7.11

Source: Black Book Research™ 2025

## KPI: Financial Viability and Managerial Stability

The vendor's strong financial stability, low employee turnover, and cultural alignment ensure that client relationships remain secure and unaffected by internal disruptions. Senior leadership and the board demonstrate sound governance, efficiently allocating resources that directly benefit clients. Clients express confidence in the vendor's long-term industry viability due to strategic investments, high client adoption rates, consistently exceptional outcomes, and reliable service levels.

Table 18 - Q15: KPI: Financial Viability and Managerial Stability

Overall Rank	Q14 Criteria Rank	Vendor	Public Hospitals	Private Hospitals	Government & Public Health Agencies	Physicians & Medical Providers	Mean
1	1	ORACLE HEALTH	9.70	9.60	9.42	9.69	9.60
3	2	ALTERA	9.43	9.19	8.89	9.07	9.15
2	3	MEDITECH	9.30	9.64	9.67	7.99	9.15

Source: Black Book Research™ 2025

## KPI: Data Security, Patient Privacy, and Backup Services

The vendor ensures the highest levels of security and data backup, delivering consistently reliable service to provider entities and affiliated business units. Their cybersecurity measures and data protection protocols surpass those of clients' previous internal systems, providing enhanced resilience and peace of mind. The vendor's practices not only meet but often exceed industry standards and regulatory requirements, setting a benchmark for security excellence in the field.

Table 19 - Q16: KPI: Data Security, Patient Privacy, and Backup Services

Overall Rank	Q15 Criteria Rank	Vendor	Public Hospitals	Private Hospitals	Government & Public Health Agencies	Physicians & Medical Providers	Mean
2	1	MEDITECH	8.62	8.63	8.24	9.23	8.68
1	2	ORACLE HEALTH	9.26	8.99	7.66	8.00	8.48
3	3	ALTERA	8.14	8.91	7.94	8.05	8.26

Source: Black Book Research™ 2025

## KPI: Support and Customer Care

The vendor offers robust account management with ample onsite administration and support, ensuring that client needs are fully addressed. A structured account management program is in place, tailored to deliver exceptional client satisfaction. The vendor is widely recognized by both media and clients as a leader in solutions and services. High levels of customer satisfaction are evident across a diverse range of clients, from flagship accounts to smaller and newer customers.

Table 20 - Q17: KPI: Support and Customer Care

Overall Rank	Q16 Criteria Rank	Vendor	Public Hospitals	Private Hospitals	Government & Public Health Agencies	Physicians & Medical Providers	Mean
1	1	ORACLE HEALTH	9.16	9.59	9.43	9.34	9.40
3	2	ALTERA	9.92	9.14	9.12	9.06	9.31
2	3	MEDITECH	8.93	9.48	9.13	9.01	9.14

Source: Black Book Research™ 2025

## KPI: Best of Breed Technology and Process Improvement

The vendor's solutions and services are recognized as best-in-class, enhancing client capabilities through advanced technology, optimized processes, high-quality deliverables, and skilled professional teams. The vendor consistently delivers service levels that meet or exceed those of clients' previous in-house systems. Their technology is both cutting-edge and highly relevant, facilitating seamless health information exchange among providers while ensuring robust patient access and interoperability.

Table 21 - Q18: KPI: Best of Breed Technology and Process Improvement

Overall Rank	Q18 Criteria Rank	Vendor	Public Hospitals	Private Hospitals	Government & Public Health Agencies	Physicians & Medical Providers	Mean
1	1	ORACLE HEALTH	8.82	8.87	8.08	8.97	8.69
3	2	ALTERA	8.83	8.02	7.83	9.42	8.50
2	3	MEDITECH	8.01	8.07	6.41	6.67	7.29

Source: Black Book Research™ 2025

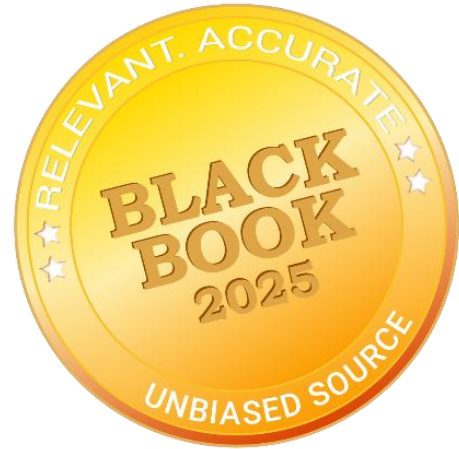
## About Black Book™

Black Book Rankings, a division of Black Book Market Research LLC, serves healthcare IT users, media, investors, analysts, quality-focused vendors, prospective software buyers, pharmaceutical and equipment manufacturers, group purchasing organizations, and other stakeholders within the life sciences and healthcare technology sectors by providing thorough, unbiased comparisons of the industry's leading technology vendors. As the largest independent opinion poll in healthcare IT, Black Book™ gathers feedback from over half a million respondents annually to evaluate vendor performance across information technology and outsourced services.

Founded in 2003, Black Book has established itself as a globally respected authority with more than 15 years of experience in customer satisfaction surveys, particularly within the technology, revenue cycle management, services, outsourcing, and offshoring sectors. Black Book™, along with its owners and employees, maintains complete independence with no financial interests or affiliations in any of the companies assessed. Our rankings and reports are entirely objective, with no incentives to endorse any vendor, ensuring the highest standards of integrity and professionalism.

Follow Black Book on Twitter at [WWW.TWITTER.COM/BLACKBOOKPOLLS](https://www.twitter.com/blackbookpolls)

For methodology, auditing, resources, comprehensive research and ranking data, see [WWW.BLACKBOOKMARKETRESEARCH.COM](https://www.blackbookmarketresearch.com)



No portion of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means—whether electronic, mechanical, photocopying, recording, or otherwise—without the prior written consent of Black Book Market Research LLC. While the information presented in this report is believed to be accurate at the time of publication, it cannot be guaranteed. The findings, conclusions, and recommendations provided by Black Book Research are based on data gathered in good faith from primary and secondary sources, which may not always be fully verifiable. Therefore, Black Book Research accepts no liability for any actions taken based on information that may later prove to be inaccurate.