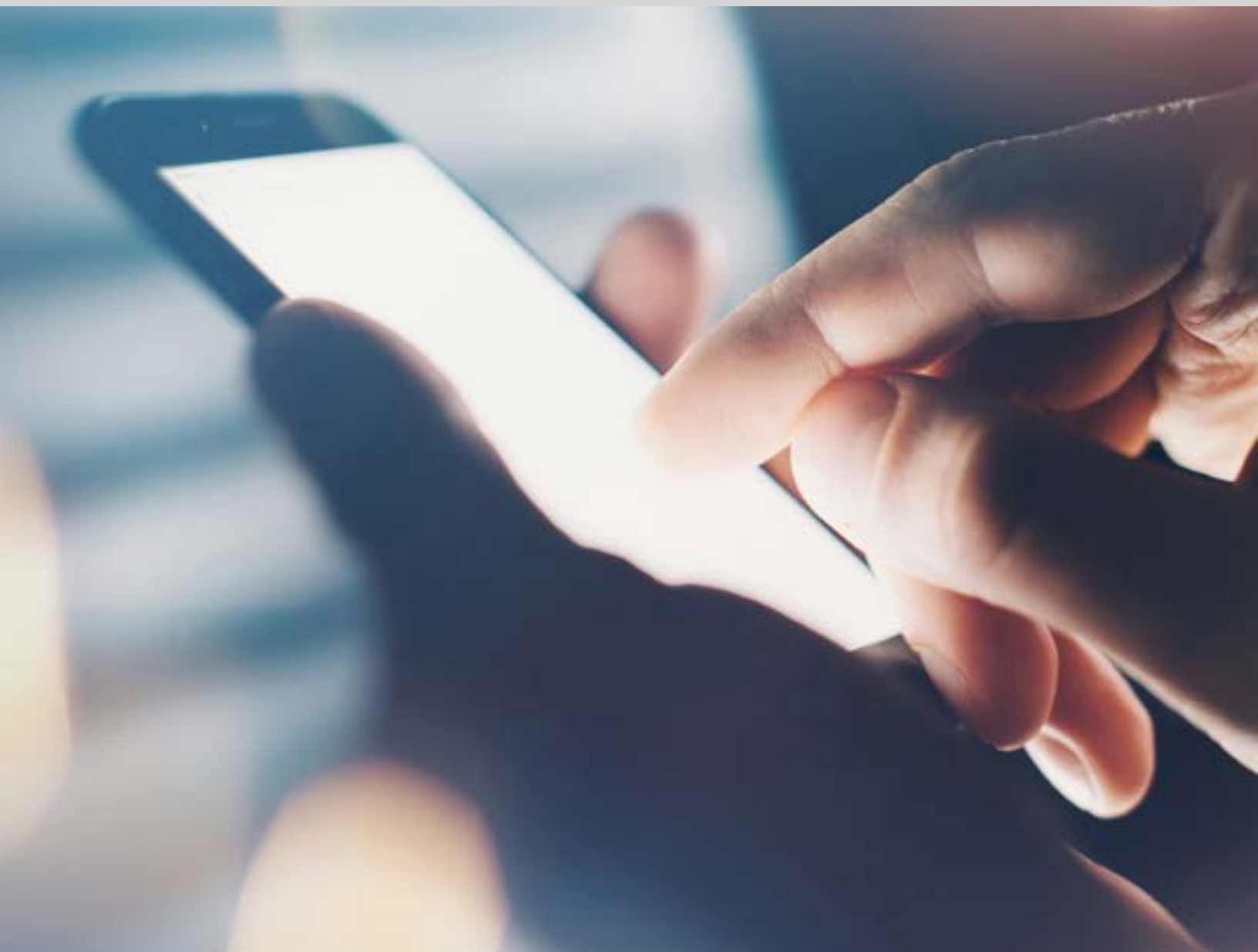


SECURE MESSAGING 2015:

FIRST LOOK AT WHO PROVIDERS ARE
CONSIDERING AND WHY

KLAS® | SEPTEMBER 2015 | PERCEPTION REPORT



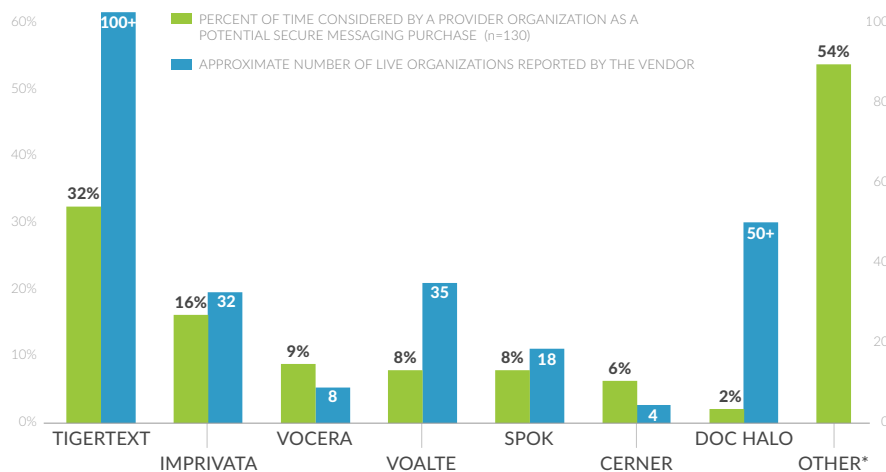
SECURE MESSAGING 2015:

FIRST LOOK AT WHO PROVIDERS ARE CONSIDERING AND WHY

To avoid security breaches and prepare for the threat of possible HIPAA audits, providers are turning to the secure messaging market. Well over 100 vendors claim to play in this rapidly emerging market, leaving providers with a daunting selection process. This report aims to simplify that process by taking an early look at the acute care secure messaging landscape to determine how providers define secure messaging, who the major players are, how deeply they are connected, and what type of objectives providers hope to accomplish going forward.

1 TIGERTEXT LEADS IN MARKET SHARE AND MINDSHARE

MINDSHARE/MARKET SHARE OF MARKET LEADERS



*Other includes: AGNITY Healthcare, AlertMD, American Messaging, AMTELCO, AT&T, Avaya, CellTrust, Cisco Jabber, Cureatr, Diagnostics, DocbookMD, DrFirst, Everbridge, eVigils, Extension Healthcare, HipLink, hippomsg, Lua, MicroBloggingMD, Mobile Heartbeat, Mutare, Notify.com, OnviGuard, PatientSafe Solutions, PerfectServe, Practice Unite, qliqSOFT, Red e App, and TeleVox

The high speed-to-value proposition offered by TigerText has allowed them to secure the largest market share of any secure messaging vendor. Imprivata is the only vendor whose mindshare is comparable to TigerText's, largely due to their existing presence in healthcare. Doc Halo receives little consideration in potential deals from providers in this study but is mentioned by other vendors as a competitor in the secure messaging space, and their market share does exceed that of many widely considered vendors.

2 TIGERTEXT'S REPUTATION DRIVES ADOPTION, BUT FUNCTIONALITY AND PRICE ARE CONCERNS

Many providers are considering TigerText based on the recommendation of their peers and on the vendor's name recognition. However, others are hesitant to contract or stay with TigerText due to high license costs and perceived functionality that does not go beyond basic secure messaging needs. Many Doc Halo customers say they chose the vendor over TigerText because they felt they could achieve the same level of functionality for a lower cost. Providers considering Imprivata and Spok are doing so largely due to the existing, positive relationship they have with the vendor through other purchases. Those considering Voalte either have an existing relationship with the vendor or feel that the functionality is more comprehensive and has more development potential than that of other vendors.

TOP REASONS:		
	FOR CONSIDERATION	NOT CHOSEN
TIGERTEXT	Name Recognition, Provider Recommendation	High Cost, Lack of Functionality
IMPRIVATA	Existing Vendor Relationship, Strong Functionality	Development Concerns
VOCERA	Existing Vendor Relationship	Lack of Functionality
VOALTE	Strong Functionality	Interoperability Concerns
SPOK	Existing Vendor Relationship	Lack of Functionality
CERNER	Interoperability	Immature Product
DOC HALO	Low Cost, Ease of Use	Interoperability Concerns

3 VOALTE PROVIDES THE MOST ROBUST INTERFACING

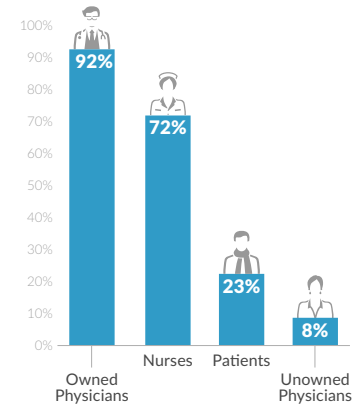
Voalte earns market share by leveraging their experience partnering with providers for other clinical offerings to achieve deeper integration per client than any other secure messaging vendor. Voalte customers most often report having nurse call and patient monitoring interfaces, and comparatively few non-Voalte clients report these interfaces. Imprivata and Spok have had limited success with interfaces, although neither vendor has managed to deeply interface in one area across multiple provider organizations. Similarly, TigerText and Doc Halo have isolated incidences of interfacing in many key areas; however, these interfaces have yet to be widely adopted across their customer bases. Although feedback is limited, PatientSafe Solutions' and PerfectServe's customer bases experience a deep level of connectivity. PatientSafe Solutions stands out for its strong EMR interface.

VALIDATED SECURE MESSAGING INTERFACES

Vendor	Vendor Status	EMR/ADT	Lab Results	Nurse Call	Patient Monitoring	Scheduling	Average # of Interfaces per Customer
TIGERTEXT	Fully Rated (15+ Responses)	1%-24%	1%-24%	1%-24%	1%-24%	1%-24%	0.33
DOC HALO	Early Data (6-14 Responses)	1%-24%	1%-24%	1%-24%	1%-24%	1%-24%	0.27
IMPRIVATA	Early Look (3-5 Responses)	1%-24%	1%-24%	1%-24%	1%-24%	1%-24%	0.40
SPOK	Early Data (6-14 Responses)	1%-24%	1%-24%	25%-49%	1%-24%	1%-24%	0.58
VOALTE	Early Data (6-14 Responses)	25%-49%	1%-24%	50%-100%	50%-100%	1%-24%	1.64
PATIENTSAFE SOLUTIONS	Early Look (3-5 Responses)	50%-100%	25%-49%	25%-49%	25%-49%	1%-24%	1.25
PERFECTSERVE	Early Look (3-5 Responses)	1%-24%	1%-24%	1%-24%	25%-49%	1%-24%	1.00

INDUSTRY USERS

Who are the end users for your secure messaging solution?



4 PROVIDERS WANT MORE THAN HIPAA COMPLIANCE FOR THE LONG TERM

For the long term, providers live with or considering a secure messaging solution are hoping to achieve goals that go beyond the basics of secure messaging, and this will require more robust functionality and interface capabilities. Because these strategic solutions require more time to be developed and deployed, many providers turn to more basic solutions as a stop-gap measure to ensure HIPAA compliance. Vendors like Doc Halo and TigerText have strategic functionality, although it has yet to be adopted by the majority of their providers.

VENDORS TO CONSIDER | A LOOK AT WHO OFFERS WHAT FUNCTIONALITY

Vendors are considered strategic if they meet at least three of the four following criteria:

1. Have KLAS-validated interfaces with at least three different healthcare systems beyond basic interfaces.
2. Offer functionality beyond the basic functionality and benefits listed below to be classified as a secure messaging solution.
3. Have a healthcare background (e.g. offer other healthcare products, have a healthcare-specific mission, etc.).
4. A large percentage of providers use the solution to accomplish strategic functionality and benefits as described below.

BASIC FUNCTIONALITY AND BENEFITS

*Not all vendors listed below necessarily provide basic functionality as listed here and should not be considered a basic secure messaging solution if they don't.

- HIPAA-compliant messaging of patient health information*
- Active Directory interface*
- Auditable messaging* records archive
- Desktop functionality*
- Encryption*

Other functionality and benefits: mobile application • communication between clinicians • pager replacement • photo and voice capabilities

BASIC VENDORS MENTIONED BY PROVIDERS

‡These vendors have been found to offer some strategic functionality upon request.

AlertMD	Doc Halo‡	MTSI
American Messaging	DocbookMD	Mutare
Amtelco	Everbridge	Notify.com
AT&T	HipLink	OnviGuard
Avaya	Iodine	qliqSOFT
CellTrust	Lua	TigerText‡
Cisco	Microsoft Lync	Verizon

STRATEGIC FUNCTIONALITY AND BENEFITS | BEYOND BASIC CONSIDERATIONS

- Quieter hospital environment (e.g., alarm routing, reduce paging and phone calls)
- Improve clinical efficiency through interfaces
- Rules engine for priority messaging and message notification escalation

Other functionality and benefits: device consolidation • better patient specific communication across the continuum of care • MDM oversight • policy creation • securely enabled BYOD • improved hospitalist workflow • bed-flow housekeeping and communication in transitions of care • documentation capabilities on mobile device • surveillance • telemonitoring • mobile waveform • mass messaging

STRATEGIC VENDORS MENTIONED BY PROVIDERS

Ascom	Imprivata	Practice Unite
athenahealth	MicroBloggingMD	Spok
Cerner	Mobile Heartbeat	TeleVox
DrFirst	PerfectServe	Voalte
Extension Healthcare	PatientSafe Solutions	Vocera

Besides the vendors that KLAS has validated, many other vendors claim to have a secure messaging platform. Not all advertised functionality is similar.

For complete list of vendors, see page 41 in full report.

REPORT INFORMATION



AUTHOR
PAUL HESS
paul.hess@klasresearch.com



ANALYST/WRITER
EMILY PAXMAN
emily.paxman@klasresearch.com

CO-ANALYST
BRYSON SMITH
bryson.smith@klasresearch.com

DESIGNER
NATALIE JAMISON
natalie.jamison@klasresearch.com

PROJECT MANAGER
JENNA ZIDEL
jenna.zidel@klasresearch.com

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We encourage our clients, friends, and partners using KLAS research data to take into account these variables as they include KLAS data with their own due diligence. For frequently asked questions about KLAS methodology, please refer to the KLAS FAQs.

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KLAS' mission is to improve the delivery of healthcare technology by independently measuring and reporting on vendor performance.

NOTE:

Performance scores may change significantly when including newly interviewed provider organizations, especially when added to a smaller sample size like in emerging markets with a small number of live clients. The findings presented are not meant to be conclusive data for an entire client base.

KLAS

630 E. Technology Ave. Orem, UT 84097
Ph: (800)920-4109 | Fax: (801)377-6345 | www.KLASresearch.com

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