The Nurses' Take on EHRs

Data collected through the Research Cloud

Executive Summary

Some (mainly vendors) have questioned why we conduct research to frontline users of core HIT systems, such as physicians, nurses, billers, schedulers, etc. They argue that only the high-ranking decision-makers matter when it comes to tracking customer satisfaction (NPS) and winning a greater piece of the market. We've had senior leaders among prominent vendors essentially tell us that they don't care about what frontline users have to say. From our perspective, this is both a shortsighted and slightly reckless position to take. Let's not forget that there is power in numbers. In this case, nurses and nurse leaders weighing in on their EHRs.

We've mentioned before and contend today that vendors that dedicate enough attention to the actual users of their solutions will unlock a competitive gold mine. Yes, it would require additional development resources, adjusting some roadmap goals, and resetting internal expectations, but the payoff is a quantifiable Unique Selling Proposition that just doesn't exist very often in HIT—having a highly-rated platform among users. Can you think of any health IT solutions that have overwhelming satisfaction among users? Rather than noodling on that for hours, we can just tell you—very few exist. Why? Because, frontline users don't directly control the purse strings, and are therefore marginalized. However, aggressive vendors that want to do right by providers could carve out larger stakes, by becoming the "user-preferred platform". We recognize pivoting in this way would be a monumental task for most businesses. Until the day comes that someone makes this kind of move, we hope you find the following data insightful.

In this research, we reached out to nurses and nurse leadership of provider organizations to find out how they feel about the EHR side of their jobs and received direct feedback from 245 individuals. Among this data we uncovered:

- Market presence of participant organizations
- Most favored EHR supplier among nurses (while no vendor received a net positive rating, there is one clear winner and it isn't even close)
- Open text responses around where each supplier needs to improve the most
- EHR platforms that are viewed as most user-friendly for nurses (again, it isn't close)

One of these days, we expect a few wise suppliers will catch the vision and shift focus to make themselves standout from the crowd. A marketing 101 lessons comes to mind: Don't try to be all things to all people. Pick one critical angle that none of your competitors has cornered and excel at that. This is how markets are disrupted. The good news is this approach would only benefit our amazing nurses who deal with these cumbersome systems on a regular basis. Coming from someone who is married to a PICU nurse at a major children's hospital currently "going live" with a major EHR install, it isn't pretty out there.

Note: A massive thank you to the nurses who were so willing to give a minute of their time to answer key questions about their experiences. Without you, our research on this topic would be impossibly difficult to conduct. We want you to know how much we value your input!

For questions or requests related to this brief, contact Jeremy Bikman at jeremy.bikman@reactiondata.com

Demographics

245
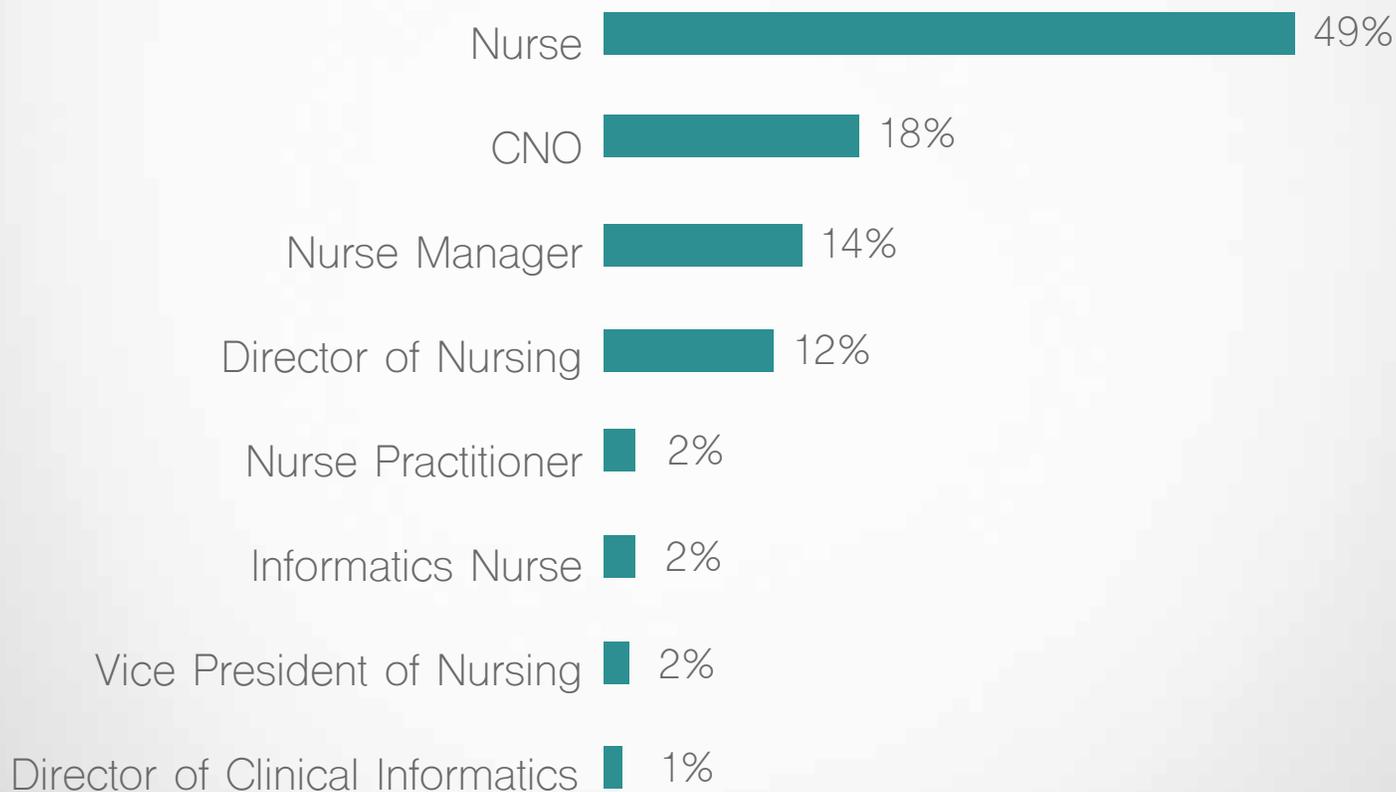Nurses &
Nurse Leaders

Primary Work Setting of Participants

15%
"I work for a medical practice"

85%
"I work for a hospital"

Participants by Title

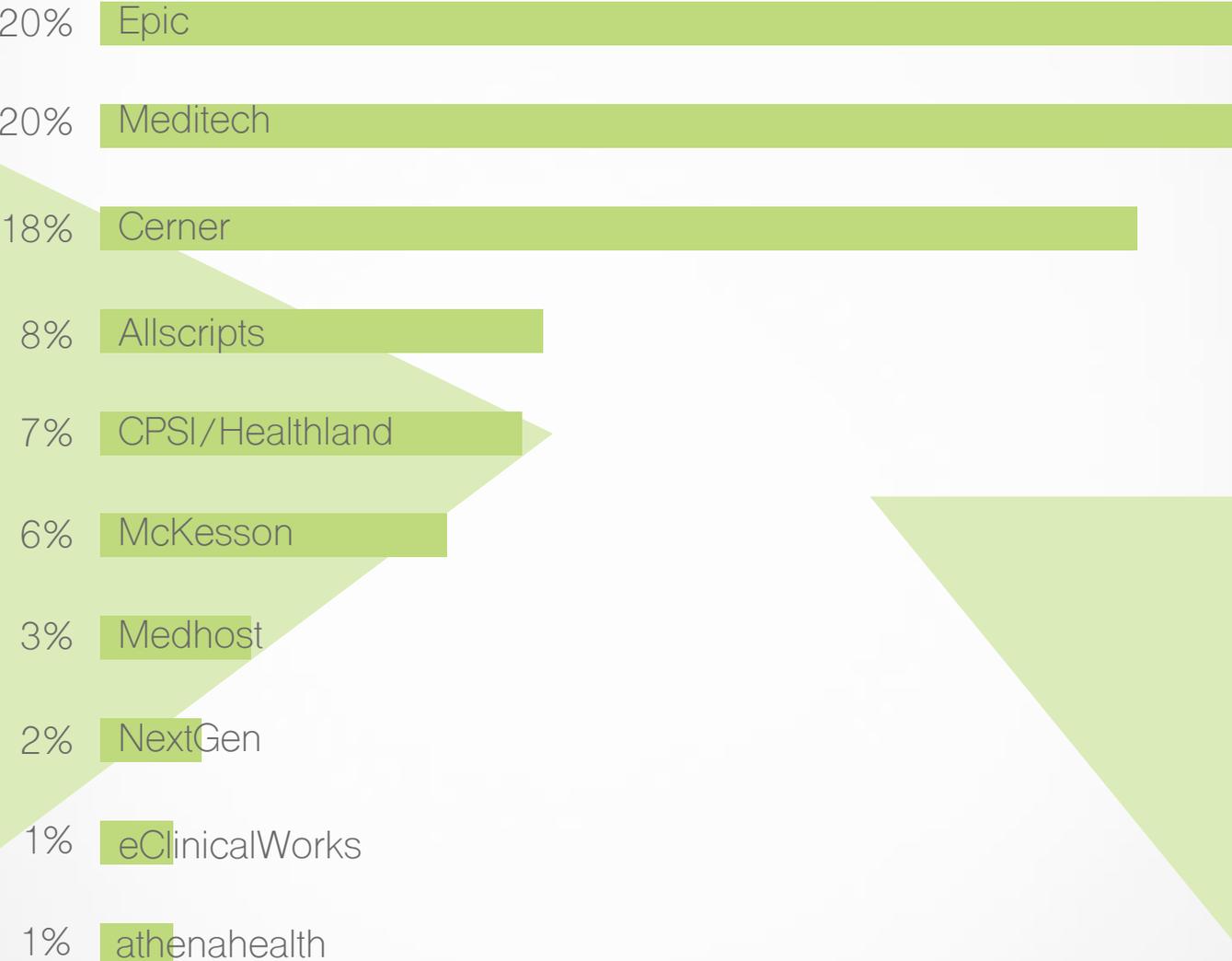| Title	Percentage
Nurse	49%
CNO	18%
Nurse Manager	14%
Director of Nursing	12%
Nurse Practitioner	2%
Informatics Nurse	2%
Vice President of Nursing	2%
Director of Clinical Informatics	1%

EHR Market Presence

Considering 85% of participants work for hospitals, this data set of EHR market presence isn't surprising. We see pretty well defined groups of vendors based on size. The big three EHR vendors (Epic, Cerner and Meditech) are at or approaching the 20% mark, the medium vendors (Allscripts, CPSI/Healthland, and McKesson) are mid to upper single digits and the rest of the pack the lower single digits.

The Allscripts acquisition of McKesson's EIS business (including their Paragon EHR), will shake the EHR market up a bit and cement Allscripts for the time being toward the upper end of the mid-sized EHR vendors. Time will tell if this plays out how Allscripts hopes, with a migration of Paragon customers to their Sunrise platform. It's not an impossible feat, but history has proven to be a mixed bag in these situations.

Percentage	Vendor
20%	Epic
20%	Meditech
18%	Cerner
8%	Allscripts
7%	CPSI/Healthland
6%	McKesson
3%	Medhost
2%	NextGen
1%	eClinicalWorks
1%	athenahealth

EHR Vendor Ratings (Net Promoter Scores)

Such is the case in healthcare IT, very few vendors break into positive territory when rated by their customers on satisfaction metrics such as the Net Promoter Score (NPS) methodology, as you will see on the next page. To have some insulation from major replacement risks, vendors need to avoid being part of the back half of the pack, almost irrespective of the range of scores.

Despite negative NPS scores across the board, Epic by far, fares the best among nurses, almost reaching neutral territory. That is a feat since nurses are one of a few core groups that make up the frontline users of EHR platforms and almost uniformly reject the time requirements of electronic charting.

The summary of this data is there is still significant work ahead for EHR vendors before anyone dials in the right balance of capturing the necessary information while still being functional for nurses and doctors.

Vendors Rated by Nurses in this Report:

Allscripts®

Cerner™

cpsi

Epic

McKESSON

MEDITECH
Medical Information Technology, Inc.

MEDHOST®

EHR Vendor Ratings (Net Promoter Scores) continued

Scores of 30+ are generally considered positive, 0–29 are neutral and less than zero... you guessed it...negative.
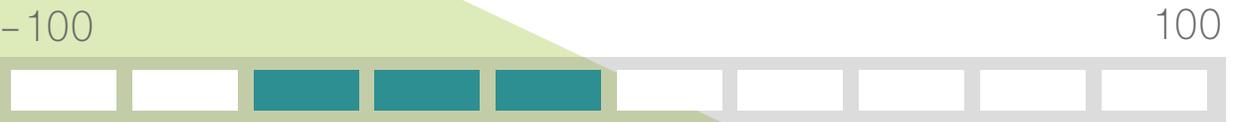
–100 | 100

Score = -2 | **n = 45**

–100 | 100

Score = -50 | **n = 46**

–100 | 100

Score = -59 | **n = 41**

–100 | 100

Score = -65 | **n = 17**

–100 | 100

Score = -83 | **n = 6**

–100 | 100

Score = -85 | **n = 13**
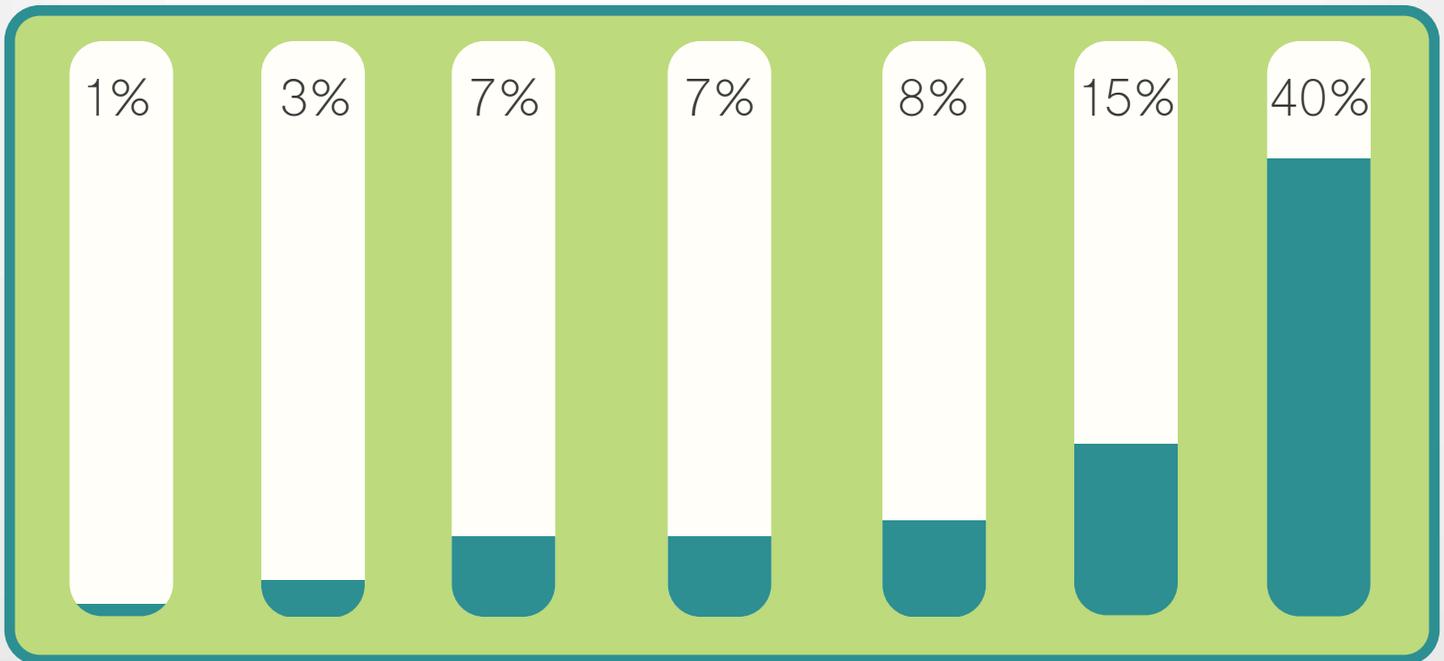
–100 | 100

Score = -94 | **n = 17**

To find out about the premium report with identified vendor scores, email Jeremy Bikman at jeremy.bikman@reactiondata.com.

Most User-Friendly EHR Suppliers for Nurses

We asked participants which EHR they have heard is the most user–friendly for Nurses. We once again find one vendor making a strong positive impression on this group, with 40% mentioning them as the most user–friendly platform.

With 245 participants, its hard to argue the validity and significance of this point.

Vendors Mentioned As Most User-Friendly by Nurses

Allscripts   athenahealth

Epic   eClinicalWorks   Cerner

McKESSON   MEDITECH
Medical Information Technology, Inc.
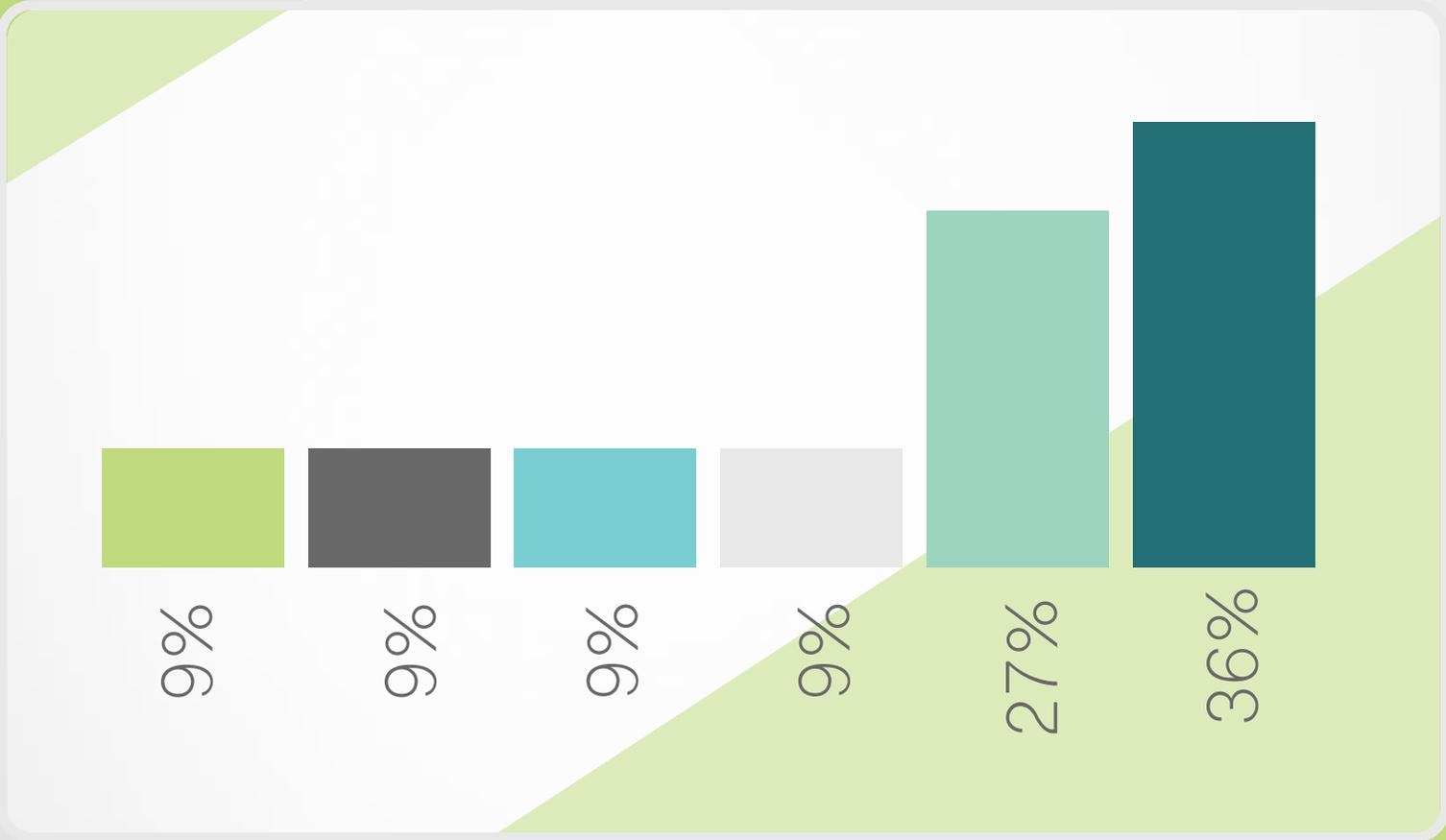
| 1% | 3% | 7% | 7% | 8% | 15% | 40% |

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Is your organization actively looking at replacing your current EHR?

17% yes	63% no	20% I dont know

Top Considered by CNO

athenahealth
Epic

Cerner
MEDHOST®

eClinicalWorks
MEDITECH
Medical Information Technology, Inc.

9%   9%   9%   9%   27%   36%

What does your EHR need to improve to support you?

"*A more improved pharmacy module; it lacks in a check and balance system and it has many holes that create patient safety concerns*"
–CNO

"*Many aspects, too many to list. Unfortunately we "customized" many programs, so they don't necessarily speak to each other...*"
–Nurse Manager

"*Coordination of care. Very fragmented documentation*"
–CNO

"*We picked [vendor omitted] as our EHR vendor because the software supposedly would tie together our hospital, outpatient clinic and nursing home. This has not proven to be true.*"
–Director of Nursing

"*Horrible and is a patient safety risk!*"
–RN

"*When we purchased this system 4 years ago, we were told that everything would be unified on what platform within 2 years, but this did not happen and will not happen*"
–CNO

"*We have to enter patient information all over whenever their status changes (i.e. Acute to swing bed).*"
–VP of Nursing

"*We need another EHR. [vendor omitted] is horrible and is a patient safety risk!*"
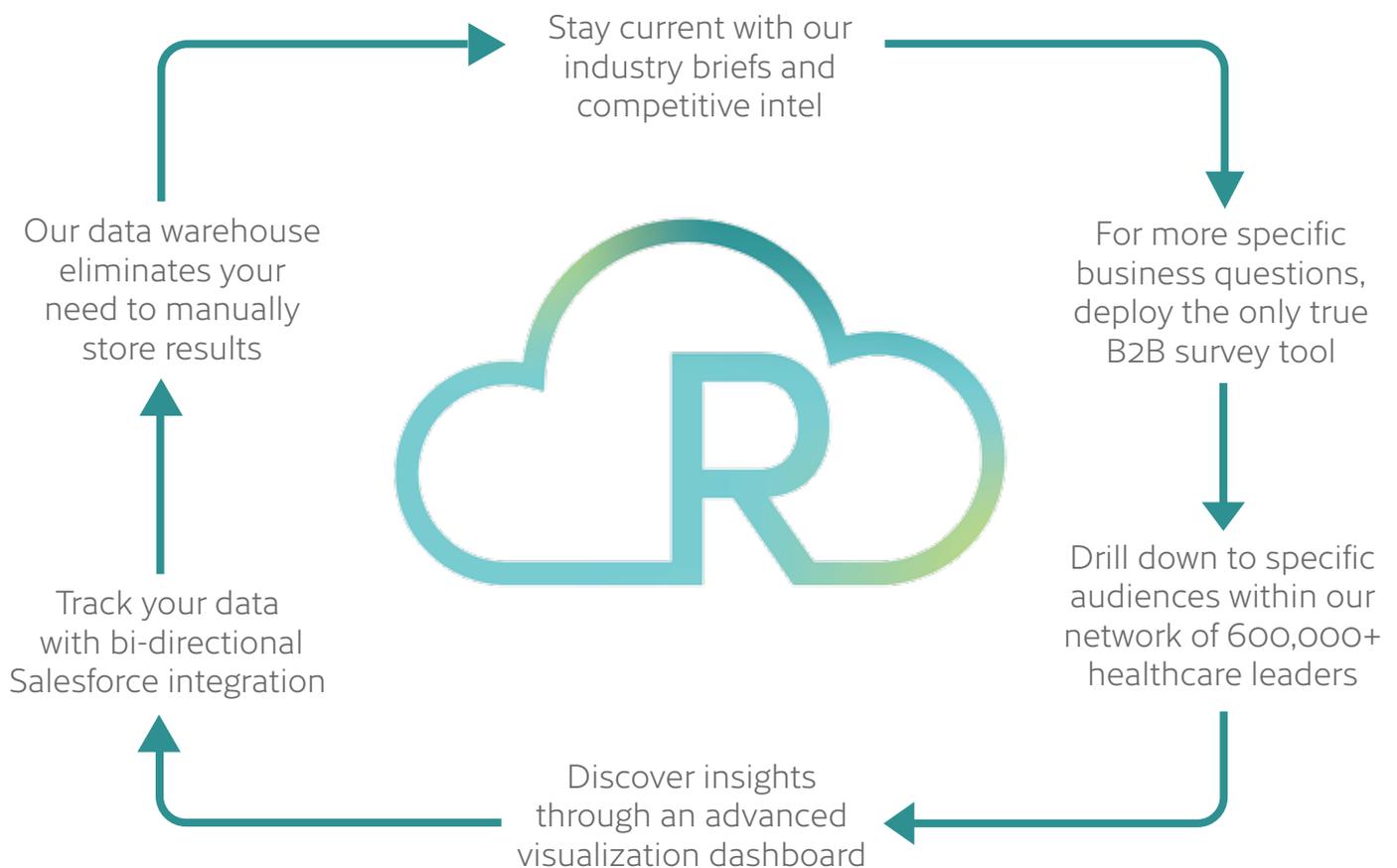–RN

"*Safety features: A CNA has the same level of access as an RN to order entry and medication administration screens*"
–Nurse Manager

To find out about our premium content which includes all comments associated with the referenced vendors, contact Jeremy Bikman at jeremy.bikman@reactiondata.com.

Industry professionals frequently ask about our platform and research. What they're really asking is...what is the Research Cloud?

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