



MCKESSON ENTERPRISE INFORMATION SYSTEMS

PARAGON HEALTH INFORMATION TECHNOLOGY USER SURVEY RESULTS

SEPTEMBER 2017

TOTAL RESPONDENTS = 280 TOTAL FACILITIES REPRESENTED = 66 USERS INVITED = 1200

The purpose of the survey is to determine from polling 216 inpatient facilities and health systems currently using McKesson Paragon products how the announced Allscripts acquisition may impact them in the next twenty-four months. Consensus was determined that despite reported speculation and buzzes in the tech ranks, there are no reported Board level or Administrative level initiatives in place that haven't already been announced to completely replace the current Paragon platforms in 2018 - 2019. Of the 8 Paragon clients that stated they were in EIS replacement processes prior to the announcement, 6 would include Allscripts in future consideration stages.

Black Book invited 1200 leaders to the poll from McKesson Paragon client acute care providers and determined that 96% of board, executive financial leaders are confidently optimistic that the Allscripts acquisition will improve Paragon client processes and technologies, and benefit their organizations.

63% of Paragon client hospital boards assert they are in no financial position to replace their EIS in the two next years and 100% confirm they have not approved capital expenditures for replacement EHR which corresponds to the knowledge of all responding administrative, financial clinical and most technology managers.

Note, nearly every Paragon client facility responding is focusing on acquiring other long delayed software initiatives because of previous EHR investments including revenue cycle management, analytics and population health tools and these will remain their primary strategic IT initiatives for 2018=2019, not EHR replacement.

Also notable, 64% of tech leaders acknowledge that their opinions in this and similar surveys typically express their personal opinions and not those of their employers, where 100% of hospital boards and executive management confirm their ballots reflect the strategies of their facilities as a whole.



PARAGON USER RESPONDENTS	EIS REPLACEMENT PLANNED IN NEXT CALENDAR YEAR	BUDGETED AN EIS REPLACEMENT IN THE NEXT CALENDAR YEAR	RECEPTIVE TO A SUNRISE REPLACEMENT OF PARAGON	THREE YEAR STRATEGIC INITIATIVE IS TO REPLACE EHR	VIEW ALLSCRIPTS ACQUISITION POSITIVELY	MY VIEWS ARE MY OWN AND DO NOT REPRESENT MY ORGANIZATION
ADMINISTRATIVE LEADERSHIP CEO, COO, VP, EXEC DIR Total Respondents 36 Facilities Represented = 28	0% (n=0 of 24)	0% (n=0 of 29)	83% (n=30 of 36)	17% (n=4 of 24)	97% (n=32 of 33)	0% (n=0 of 36)
FINANCIAL LEADERSHIP CFO, VP, CONTROLLER Total Respondents 58 Facilities Represented = 32	0% (n=0 of 51)	0% (n=0 of 45)	92% (n= 35 of 37)	3% (n=1 of 34)	91% (n= 52 of 57)	4% (n= 2 of 50)
TECH & RECORDS LEADERSHIP CIO, VP, DIRECTOR Total Respondents 117 Facilities Represented = 58	6% (n=7 of 116)	0% (n= 0 of 93)	81% (n=83 of 101)	18% (n=16 of 89)	91% (n=105 of 115)	62% (n=64 of 104)
CLINICAL LEADERSHIP RN, MD, ANCILLARY, SR MGMT Total Respondents 30 Facilities Represented = 27	0% (n=0 of 25)	0% (n= 0 of 21)	87% (n=26 of 30)	7% (n=2 of 30)	86% (n=25 of 29)	0% (n=0 of 16)
BOARD OF TRUSTEES Total Respondents 39 Facilities Represented	0% (n=0 of 30)	0% (n= 39 of 39)	100% (n= 30 of 30)	0% (n=23 of 23)	98% (n=36 of 37)	0% (n=0 of 20)



PARAGON USER RESPONDENTS	NEED FOR IMPROVED PARAGON RESEARCH & DEVELOPEMENT	CONFIDENTLY OPTIMISTIC OF ALLSCRIPTS AS ACQUIRER OF MCKESSON PARAGON	UDPATED RCM & POP HEALTH & ANALYTICS ARE HIGHER PRIORITIES THAN EHR REPLACEMENT
CHIEF INFORMATION OFFICERS SENIOR IT MANAGEMENT	96% (n=112 of 117)	94% (n=102 of 109)	93% (n=99 of 106)
EXECUTIVE ADMINISTRATION BOARD OF TRUSTEES	92% (n=44 of 48)	100% (n=40 of 40)	100% (n=33 of 33)
CHIEF MEDICAL OFFICERS CHIEF NURSING OFFICERS SENIOR CLINICAL MANAGEMENT	60% (n=29 of 38)	92% (n=36 of 39)	100% (n=17 of 17)
CHIEF FINANCIAL OFFICERS SENIOR FINANCE MANAGEMENT	92% (n=51 of 56)	97% (n=60 of 62)	100% (n=66 of 66)



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