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## Rankings of Radiology IT Solutions by End-Users in the 2023 Best in KLAS Program



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KLAS Research, a healthcare information technology market research firm, has released its 2023 Best in KLAS report, which includes sections for radiology on PACS, speech recognition, universal viewers, image exchange software and vendor neutral archives (VNA).

KLAS reports try to find the true story of what is happening with every vendor solution by interviewing clinicians who are the product end-users. KLAS said the report is not a perfect sample size and does not include all vendors but, rather, offers hospitals a much larger group of references than a traditional reference check of a couple customers from a vendor's reference list. The research allows providers and payers to hear frank comments from install sites. The report covers more than 1,000 health informatics solutions used across health systems.

### Best performing large health system PACS

In the PACS product category for large healthcare centers with more than 300,000 studies per year, the Best in KLAS product was Sectra, which it has earned several year in a row. The list in order of overall performance score:

- **Sectra** PACS, 87.1
- **Merative** (formerly IBM Watson Health) Merge PACS, 84.5
- **Change Healthcare** Radiology Solutions, 80.3
- **Fujifilm** Synapse, 78.5
- **Agfa Healthcare**, Enterprise Imaging for Radiology, 75.6
- **GE Healthcare** Centricity PACS, 60.4

Sectra users said they would buy the product again and 100% said they have long-term plans with this vendor. Change Healthcare scored high for keeping promises, with 95% of users. Merative was listed as very likely to be purchased again in the future with 96% of its users.

KLAS gathered information on five other PACS in this category, but the organization did not have enough data for an apples-to-apples comparison with the other vendors. These included:

- **Infinitt** PACS, 87.9
- **Philips** Vue PACS (Carestream), 78.8
- **Agfa HealthCare** IMPAX, 65.8
- **Intelerad** IntelePACS, 64
- **Philips** IntelliSpace PACS (not its primary PACS), 60.5

### Best performing small health system PACS

The small PACS market is classified as healthcare organizations with less than 300,000 studies per year. The Best in KLAS product was Sectra. The vendor's users all said they would buy the product again and all expected to include Sectra in their long-term plans.

The list of all vendors included in interviews in order of overall performance scores:

- **Sectra** PACS, 89.6
- **Fujifilm** Synapse, 83.8

- **Philips** Vue PACS (Carestream), 83
- **Change Healthcare** Radiology Solutions, 81.7
- **Infinitt** PACS, 79.4
- **Merative** (formerly IBM Watson) Merge PACS, 78.5
- **Konica Minolta** Exa PACS, 77.5
- **Intelerad** IntelePACS, 73.7
- **GE Healthcare** Centricity PACS, 67.9

For Sectra, 96% of end-users said they would buy the system again.

Four other PACS were mentioned, but not included in the overall rankings because KLAS did not have enough information. These included:

- **Agfa HealthCare** Enterprise Imaging for Radiology, 80.1
- **Novarad** NovaPACS, 73.6
- **PaxeraHealth** PaxeraUltima, 90.5
- **Philips** IntelliSpace (not used as a primary system), 75

### PACS market insights

In the KLAS market report *PACS 2022 Changing Market Leads to Volatility among Large- to Small-Volume Organizations*, the authors noted the following key trends:

1. Sectra maintained leading customer satisfaction across small and large volumes PACS, and there were early indicators of a culture shift.
2. There were signs of improvement from Fujifilm and Merative due to increased engagement with end-users.
3. For Philips Vue PACS and Infinitt, the satisfaction gap widened between small and large customers.
4. Support dipped for Intelerad customers amid several acquisitions. Change Healthcare customers said they were unsure of vendor's future.
5. GE HealthCare being replaced due to disengaged relationships, end-users said. Philips' IntelliSpace PACS customers said they were on the fence about Vue PACS.
6. Agfa HealthCare rectified a bumpy rollout of enterprise imaging for radiology and many large Impax customers still hesitant to move.

### The top medical imaging universal viewers

Visage Imaging earned the Best in KLAS for universal viewers used in radiology. The overall rankings from end-users were:

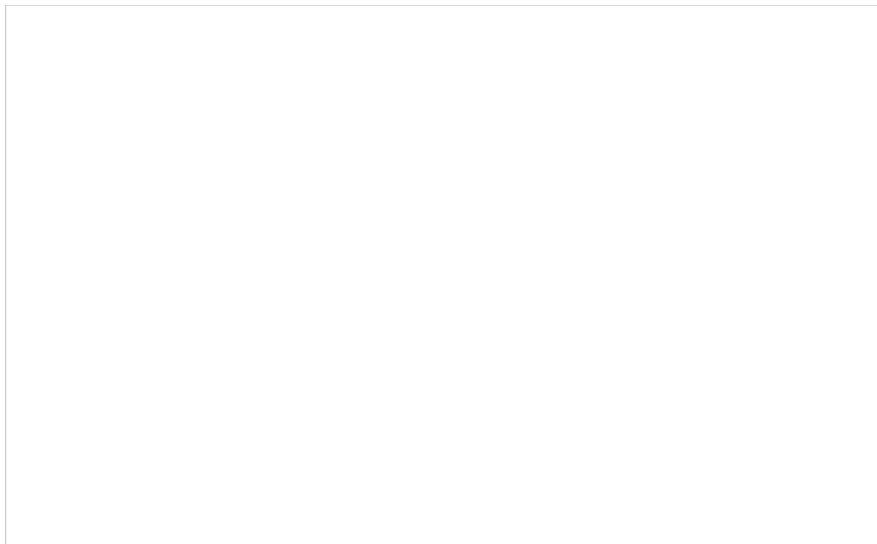
- **Visage Imaging** Visage 7, 90.2
- **Mach7** Technologies eUnity, 88
- **Philips** Enterprise Viewer Vue Motion (Carestream), 86
- **Merative** (formerly IBM) iConnect Access (Universal Viewer), 80.4
- **Agfa HealthCare** Enterprise Imaging Xero Viewer, 79.2
- **GE HealthCare** Universal Viewer, 66

GE slipped 9% from its score in 2022. Merative also saw a 6% low score and Agfa a 5% lower score.

KLAS said the clinicians interviewed said they would purchase products again from Visage Imaging (100%) and Mach7 Technologies (96%).

Two other vendors were not ranked because of limited data, including:

- **Fujifilm** Synapse Mobility, 88.6
- **Hyland** NilRead, 79.7



An example of natural language processing dictation using the MModel system at RSNA 2022. It shows highlighted text for the system identifies as key words for the radiology report. Photo by Dave Fornell.

### Speech recognition software for radiology

For radiology speech recognition platforms, 3M MModal Fluency was named the Best in KLAS product.

The vendors overall performance scores were:

- **3M MModal** Fluency for Imaging, 93.4
- **Dolbey** Fusion Expert, 87.2
- **Nuance** PowerScribe 360/One, 87

Users of the Dolbey solution said the vendor kept all promises made. Users also said they were very likely to buy again the products from Nuance and 3M. Users also said they liked 3M for not charging for every little thing they did and would include them in long-term planning.

### Top image exchange software

In the category of image exchange software, three vendors were included and Nuance ranked Best in KLAS this year. The overall performance rankings were:

- **Nuance** PowerShare 89.1
- **Merative** (formerly IBM) iConnect Access (Image Exchange) 82.8
- **Intelrad** Ambra Image Exchange (DicomGrid) 81.8

When end-users were asked whether the vendor is included in long-term plans, Intelrad had a 100% yes score. Nuance achieved 97% yes.

### Rankings for vendor neutral archives

Health systems use VNAs to store the vast amounts of imaging data created each year. The Best in KLAS vendor was again Fujifilm. The overall rankings of the vendors included in this research were:

- **Fujifilm** Synapse VNA (TeraMedica), 88.3
- **Merative** (formerly IBM Watson) iConnect Enterprise Archive, 81.7
- **Philips** Enterprise Repository Vue Archive (Carestream), 81.5
- **Agfa HealthCare** Enterprise Imaging VNA, 76.5
- **Mach7 Technologies** Mach7 VNA, 75.7
- **Hyland** Acuo, 74.2
- **GE Healthcare** Centricity Clinical Archive Solution, 73.4

The most notable change in scores according to KLAS was Mach7, which slid 6% from its 2022 ranking.

Fujifilm scored high with users, who said they are including the vendor in future planning and because the vendor avoids charging for every little thing.

Three other vendors not ranked because of limited data included:

**Change Healthcare**, 90.2

**Sectra VNA**, 94.5

**InsiteOne** Unified Clinical Archive, 74.9

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