Metro South Health

CAREPACT

Market Scan Report

This Market Scan Report has been prepared for Digital Health & Innovation, Metro South Health. The content reflects a comprehensive assessment of vendor capabilities, informed by CAREPACT's requirements and aligned with Metro South Health's strategic goals for digital health transformation.

Disclaimer

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1. Introduction

1.1. Background

The CAREPACT service at Metro South Health (MSH) provides specialist-led care for residents in Residential Aged Care Facilities (RACFs), aiming to reduce unnecessary hospital transfers and improve patient outcomes. However, the service currently relies on manual workflows and legacy systems that impede efficiency, create administrative burdens, and limit the ability to coordinate care effectively.

To address these challenges, MSH engaged Evolve Health Digital to conduct a comprehensive market scan. This document outlines the findings, identifying potential vendor partners with the capability to deliver an integrated care solution that aligns with CAREPACT's strategic objectives and operational requirements.

1.2. Problem statement

The current systems supporting CAREPACT are fragmented and lack the interoperability required to enable effective communication and data sharing between RACFs and Health and Hospital Services (HHS). This limits the ability to deliver timely, coordinated care and contributes to inefficiencies in clinical handovers.

The purpose of this market scan is to identify vendors who can provide a comprehensive, integrated care solution. This solution must allow effective communication, enhance data sharing, and support the clinical handover processes, ultimately improving care coordination and outcomes across Metro South Health.

1.3. Scope

The market scan focuses on identifying potential vendors capable of delivering a solution that addresses CAREPACT's requirements. The key activities within the scope of this market scan include:

- Conducting a high-level desktop review of potential vendors to assess their alignment with the strategic goals and functional requirements of a new CAREPACT platform.
- Engaging vendors to gather detailed information about their capabilities and solutions.
- Evaluating vendor solutions against established criteria, including functionality, interoperability, scalability, and support for secure data exchange.
- Shortlisting vendors for further evaluation and possible procurement processes.
- Delivering a presentation of findings to stakeholders, highlighting vendor capabilities, strengths, and areas for further investigation.

1.4. Methodology

The market scan methodology was designed to systematically identify, evaluate, and shortlist vendors capable of meeting CAREPACT's objectives. The process involved three key phases:

1. **Desktop Review:** A high-level review of 16 vendors was conducted to assess their alignment with CAREPACT's strategic goals and functional requirements. This review focused on key criteria such as functionality, interoperability capabilities, scalability and experience in delivering healthcare-focussed solutions.

2. **Vendor Engagement:** Following the desktop review, selected vendors were engaged through meetings and discussions to gather insights into their offerings. This phase focused on alignment of their solutions with the system objectives, technical specifications, implementation approaches, timelines and ongoing support.

3. **Shortlist Development**: Based on the findings from the desktop review and engagement process, a shortlist of vendors was created. These vendors were selected for their ability to align with CAREPACT's operational requirements and strategic priorities.

2. Objectives

2.1. Business and Technical Objectives

The market scan aims to identify a vendor solution that aligns with the following key business and technical objectives:

- **Enhanced Care Coordination**: Facilitate efficient communication and collaboration between RACFs and HHSs.
- **Streamlined Data Sharing:** Enable both synchronous and asynchronous communication to support clinical handovers and share essential patient data securely and efficiently.
- **Interoperability:** Ensure integration with existing systems, including RACF platforms, Queensland Health systems, and national healthcare platforms, to create a unified digital ecosystem.
- **Scalability:** Identify solutions that can evolve to meet future demands, ensuring long-term viability as CAREPACT and similar services expand their reach and capabilities.
- **Operational Efficiency**: Minimise administrative burden through automation and workflow optimisation, freeing up clinicians to focus on delivering patient care.

2.2. Key Features and Capabilities

To meet the identified objectives, the vendor solutions must provide the following features and capabilities:

- **Digital Referrals and Legacy Support:** Enable digital referrals while accommodating manual or legacy referrals through ingestion tools.
- **Document Handling:** Allow for secure storage, transmission, and acknowledgment of essential clinical documents such as discharge summaries and referral records.
- **Integration and Interoperability:** Support integration with key systems, including RACF platforms and Queensland Health systems (e.g., HBCIS, Cerner/iEMR).
- **Scalability:** Provide a flexible, scalable platform to accommodate increased load demand and additional integrations over time.
- **Synchronous and Asynchronous Communication:** Support real-time interactions (e.g., telehealth) and data sharing (e.g., discharge summaries) between CAREPACT, RACFs, and other stakeholders.
- **User-Centric Design:** Offer an intuitive, user-friendly interface to facilitate adoption by diverse stakeholders, including clinicians and administrative staff.

These high-level features have been extracted from the Business Requirements Specification also provided by Evolve Health Digital.

2.3. Evaluation Approach

The assessment of potential vendors was guided by a structured approach, focusing on their ability to meet the project's key requirements and objectives. Key factors considered during the evaluation included:

- **Alignment with Key Features and Capabilities:** Vendors were assessed based on their ability to support the core features and functionalities outlined in this document, such as interoperability, scalability, and support for digital workflows.
- **Vendor Track Record:** Emphasis was placed on vendors' proven experience in delivering healthcare solutions and their understanding of the unique challenges of aged care and hospital coordination.
- **Availability and Responsiveness:** The willingness and ability of vendors to engage with the project team and respond promptly to queries were important indicators of their reliability.
- **Cost-Effectiveness:** Consideration was given to the overall value offered by the vendors, balancing cost with the quality and comprehensiveness of their solutions.
- **Quality of Initial Engagement:** Vendors were evaluated on their professionalism, clarity in communication, and willingness to collaborate during initial discussions and demonstrations.

3. Market Scan Results

The market scan explored a diverse range of vendors offering solutions with varying degrees of alignment to CAREPACT's strategic objectives and technical requirements. This section summarises the findings from a detailed evaluation of 16 potential vendors, encompassing their core capabilities and suitability for the proposed CAREPACT Connect platform. The results reflect both the strengths and limitations of each vendor, providing a foundation for further evaluation and potential procurement. Detailed information on each vendor can be found in the Appendix.

3.1. Vendor Identification

Potential vendors were identified via the following:

- **Industry Research:** Leveraging market knowledge and trends to identify relevant players in healthcare technology.

- **Network Recommendations:** Engaging stakeholders and experts within the healthcare sector to highlight proven and emerging vendors.

- **Existing Vendor Relationships:** Reviewing vendors already known to Metro South Health or associated with similar projects.

- **Evolve Health Digital Expertise:** Drawing on Evolve's experience and insights into healthcare technology to shortlist vendors with strong alignment to project needs.

This structured approach ensured a diverse and representative pool of candidates for the market scan.

3.2. Vendors Not Shortlisted

A range of vendors were evaluated during the market scan but ultimately not shortlisted for further consideration. These vendors include:

- Andersen Labs
- Autumn Care
- Civica
- Clintel CareRight
- Epic
- Five Faces
- Leecare Solutions
- MEDITECH
- Microsoft
- Orion Health
- Teladoc Health

While these vendors demonstrated capabilities in certain focus areas, they were not shortlisted due to one or more of the following factors:

- Limited alignment with the specific requirements of CAREPACT Connect, such as support for integrated referral management or interoperability with RACF and HHS systems.

- Focus on adjacent rather than core functionalities, such as population health, hospital-centric solutions, or relationship management, which did not fully address CAREPACT's priorities.

- Gaps in experience or proven deployment in Australian aged care and hospital transitions of care, making them less suited for the unique challenges and objectives of this project.

- Difficulty in establishing effective communication with some vendors, despite multiple methods of contact, including email follow-ups and phone calls. Disengagement or lack of timely responses presented challenges in fully evaluating these solutions.

- The solution was identified to be immature relative to the integration requirements of this project.

- Other products while established and developed were known for limited customisation capabilities and desire particularly for small scale projects.

- A significant reliance on third party development and subcontracting leading to concerns around delivery consistency and project oversight.

- Limited or no established integrations/deployments in relevant geographical or regulatory contexts.

This summary reflects the focus of the market scan on identifying vendors with a strong track record and the capability to deliver a solution tailored to CAREPACT Connect's vision and strategic objectives.

3.3. Shortlisted Vendors

Following the evaluation process, five vendors were shortlisted (in no order of priority) for their demonstrated alignment with the objectives and requirements of CAREPACT Connect. Each vendor has showcased a strong track record of delivering healthcare-focused solutions, along with the flexibility to adapt their platforms to meet CAREPACT's operational and strategic needs. This section provides an overview of the shortlisted vendors and their suitability for further consideration in the procurement process.

1. Alcidion

Website: www.alcidion.com
Established: 2000
Headquarters: South Yarra, Victoria, Australia

Alcidion is an established healthcare technology provider, delivering solutions to 403 hospitals and 87 healthcare organisations across Australia, New Zealand, and the UK. Their focus on user-centric design and ease of interaction aligns well with CAREPACT Connect's objectives to streamline workflows and enhance operational efficiency. Key highlights of Alcidion's offering include:

- **Miya Precision Platform**: A configurable system that supports interoperability, real-time data exchange, and analytics capabilities, enabling integration with existing healthcare systems.
- **Scalability and Flexibility**: The platform is designed to overlay existing systems like Cerner and offering a comprehensive dashboard for patient flow and clinical decision-making without requiring extensive custom development.
- **Cost:** While highly priced, licensing models are flexible, such as per bed or facility.

Alcidion's proven experience with Australian healthcare environments, their focus on leveraging HL7® FHIR® standards, and their track record of successful implementations (e.g., Alfred Health, NT Health) make them a strong contender for CAREPACT Connect.

2. Oracle (Cerner)

Website: www.oracle.com./au/health
Established: 1979
Headquarters: Kansas City, Missouri, USA

Oracle Cerner is one of the most established and globally recognised vendors in the healthcare technology industry with an extensive portfolio of clients across the world. Oracle provides robust, enterprise-level solutions for health information management and exchange.

- **Existing Queensland Footprint**: Oracle Cerner has an established presence in Queensland, offering its Health Information Exchange (HIE) solutions as part of its existing partnerships. This includes supporting initiatives for patient data exchange and healthcare interoperability.
- **Interoperability and Scalability**: Cerner's HIE platform is designed to support data exchange and integration across healthcare networks.
- **Global Reach and Experience**: Oracle Cerner supports a vast network of healthcare organisations globally, making them a proven vendor for complex projects.
- **Cost Considerations**: Oracle's solutions are enterprise-grade, often associated with higher costs due to their extensive capabilities and implementation complexities.
- **Case Study - OneLondon**: Oracle Cerner's successful support of the OneLondon regional health information exchange highlights its ability to manage complex, multi-stakeholder environments while enabling interoperability across healthcare providers.

Oracle Cerner's longstanding industry presence and proven ability to deliver scalable, interoperable solutions position them as a strong contender for the CAREPACT Connect system. However, their solutions are typically associated with high implementation costs and require significant organisational alignment to achieve maximum benefit.

3. InterSystems

Website: www.intersystems.com/au
Established: 1978
Headquarters: Cambridge, Massachusetts, USA

InterSystems is a leader in healthcare technology, specialising in data exchange, interoperability, and scalable solutions. Their HealthShare platform is widely used across large healthcare networks. Known for its flexibility and robust data management capabilities, InterSystems is well-positioned to address the needs of CAREPACT Connect.

- **HealthShare Platform**: A powerful solution designed to enable real-time data exchange and integration diverse healthcare systems. It supports HL7® FHIR® standards, enabling interoperability with existing systems.
- **Scalability and Flexibility**: HealthShare's "data mesh" architecture provides the ability to ingest, standardise, and integrate large volumes of patient data.
- **Global Expertise**: Deployed successfully in complex healthcare environments, including South Australia and Western Australia state health systems, and the U.S. Veterans Administration.
- **Value-Added Features**: Includes tools like collaborative worklists, patient portals, and Health Connect Cloud, which support batch and real-time data exchange and improve patient engagement and care coordination.
- **Flexible Pricing Models**: Options include tiered structures or user-based funding, making it adaptable to both small-scale and large-scale deployments.

InterSystems' robust track record in interoperability, their innovative HealthShare platform, and their ability to integrate seamlessly into complex healthcare networks position them as a strong candidate for CAREPACT Connect. Their focus on scalability and flexibility aligns with the CAREPACTs goal of supporting RACFs and healthcare providers across Metro South Health and beyond.

4. Salesforce

Website: www.salesforce.com/au/solutions/industries/healthcare
Established: 1999
Headquarters: San Francisco, California, USA

Salesforce is a globally recognised technology provider, offering highly customisable solutions across multiple industries, including healthcare. Leveraging its Health Cloud platform, Salesforce has established a reputation for delivering flexible, user-friendly systems that support complex workflows and integration capabilities.

- **Customisable Workflows**: Salesforce Health Cloud enables tailored workflows to meet the specific needs of healthcare organisations, allowing the system to adapt as requirements evolve.
- **Integration Expertise**: Known for API integration capabilities, Salesforce has experience connecting with a range of healthcare systems.
- **Scalability and Flexibility**: The platform is designed to scale with organisational needs, supporting growth and additional features without requiring substantial redevelopment.
- **Existing Queensland Health Footprint**: Salesforce has an established presence in Metro South Health. This provides opportunities to leverage existing infrastructure and professional services for CAREPACT Connect. Salesforce showcased its capabilities in a recent demonstration, presenting a potential end-to-end solution.
- **Cost Considerations**: Salesforce's flexible pricing model is tied to user licenses and consumption rather than development

Salesforce's combination of flexibility, existing healthcare experience, and alignment with Metro South Health's infrastructure positions it as a valuable option for CAREPACT Connect. However, careful consideration of identified patient flow gaps will be necessary for assessing overall feasibility.

5. Telstra Health

Website: www.telstrahealth.com
Established: 2013
Headquarters: Melbourne, Victoria, Australia

Telstra Health is a prominent Australian healthcare technology provider with a diverse portfolio of solutions aimed at supporting primary care, aged care, and hospital services. Over recent years, Telstra Health has focused on expanding its capabilities through strategic acquisitions, positioning itself as a leading provider for integrated healthcare systems in Australia.

- **Local Expertise**: As a domestic provider, Telstra Health understands the unique challenges and regulatory requirements of the Australian healthcare system.
- **Experience with RACF**: Telstra Health has worked on aged care transfer document initiatives with the federal government, including providing FHIR-compatible solutions for secure data exchange.
- **Interoperability Potential**: Their solutions emphasise integration capabilities, though some elements (e.g., telehealth features) may require further co-design to meet specific CAREPACT needs.
- **Strategic Realignment**: Telstra Health's recent reorganisation to consolidate siloed applications into a unified business unit could enhance solution sustainability but also introduces uncertainties regarding long-term support for legacy systems.

Telstra Health has demonstrated its ability to support aged care transfer summaries through its collaboration with federal initiatives. However, additional development or partnerships may be required.

Telstra Health's established presence in the Australian healthcare landscape positions it as a valuable contender for CAREPACT Connect. However, the potential impact of its strategic realignment and gaps in specific RACF communication functionalities should be carefully evaluated to ensure alignment with long-term project goals.

4. Next Steps

The CAREPACT Connect initiative represents a transformative opportunity to improve care coordination and deliver better outcomes for aged care residents and healthcare providers alike. By following these next steps, Metro South Health can move toward implementing a solution that addresses current challenges and positions CAREPACT as a leader in digitally integrated aged care support services.

4.1. Procurement Process

Initiate a Competitive Tender Process: Conduct a formal procurement process to evaluate the shortlisted vendors against CAREPACT's requirements. This should include:

- Comprehensive cost assessments covering licensing, implementation, and long-term scalability.
- Evaluation of vendor capabilities for seamless integration, user experience, and alignment with strategic goals.

Engage Stakeholders: Involve key stakeholders, including RACF representatives, CAREPACT staff, and IT teams, in the procurement process to validate vendor suitability and ensure the selected solution addresses operational needs.

4.2. Vendor Engagement

Clarify Integration Capabilities: Work closely with shortlisted vendors to address any gaps in their proposed solutions. Focus discussions on:

- Integration with existing systems (e.g., HBCIS, Cerner/iEMR, and RACF platforms).
- The ability to support real-time data exchange and HL7® FHIR® standards.
- Additional customisations or configurations required to meet CAREPACT's unique needs.

Assess Support Models: Confirm the ongoing support and maintenance offerings from vendors, ensuring that these align with CAREPACT's long-term operational requirements.

4.3. Implementation Planning

Phased Rollout Strategy: Develop a phased implementation plan starting with pilot deployments in a small number of RACFs. This will allow for:

- Testing system functionality and workflows in real-world settings.
- Identifying and addressing any issues before wider deployment.

End-User Training: Provide training and onboarding for CAREPACT staff and RACF users to ensure smooth adoption of the new system. Training programs should focus on:

- Effective use of new digital workflows.
- Navigating key features, such as referral management and discharge processes.

Change Management: Implement a structured change management process to guide users through the transition from legacy systems to CAREPACT Connect. This includes ongoing communication to address concerns, highlight benefits, and maintain engagement.

4.4. Future Considerations

Support for Future Integrations: Ensure the selected solution remains adaptable to future integration opportunities, such as interoperability with Queensland Ambulance Service and other emerging digital health initiatives.

Stakeholder Collaboration: Establish a governance structure for ongoing collaboration with RACFs and HHSs to regularly review and update clinical pathways. This ensures the system evolves in line with changing healthcare needs and regulatory requirements.

Monitoring and Continuous Improvement: Develop a framework for monitoring system performance, gathering user feedback, and making iterative improvements to optimise the platform's functionality and user experience over time.

Appendix

ID	Vendor	Website	Notes	Outcome
1	Alcidion	www.alcidion.com	• Miya Precision platform with real-time analytics, FHIR/HL7 compatibility, Miya Flow dashboard. • Supports workflow efficiency, two-way integration, and "eNoting" functionality. • Flexible options: per-bed, facility-based, or custom licensing. • Implemented at Alfred Health, Western Health, NT Health, and South Tees NHS Trust. • Highly intuitive user interface, clinician-designed, scalable, and local expertise in Aus healthcare. • No inbuilt telehealth functionality; no current Cerner integrations in Queensland.	Shortlisted
2	Andersen Labs	andersenlab.com/industries/healthcare	• Focus on interoperability and custom development with a cloud-based architecture. • Appears to rely on development rather than offering ready-made solutions. • Development work often subcontracted externally. • No prior experience in aged care or linking hospitals to RACFs.	Not Shortlisted
3	Autumn Care	autumn.care/homepage	• Comprehensive clinical management system designed for aged care, integrating with My Health Record and third-party systems. • User-friendly, mobile-enabled platform with real-time updates and customisable workflows. • Focus on clinical governance, regulatory compliance, and scalable, phased rollouts. • Smaller-scale organisation with limited development budgets and no well-integrated solution. • Repeated attempts at contact (calls and emails) received no response, indicating potential engagement issues.	Not Shortlisted
4	Cerner	www.cerner.com/au/en	• Existing Queensland Health footprint with Health Information Exchange (HIE) capabilities. • Demonstrated ability to support large-scale projects (e.g., OneLondon initiative). • Globally recognised for enterprise-grade health information solutions.	Shortlisted
5	Civica	www.civica.com/en-au	• Cost-effective solutions with a focus on usability and public sector needs. • Strong integration capabilities with existing systems but no specific focus on RACF or inpatient care. • Primarily oriented toward population health management.	Not Shortlisted

6	Clintel CareRight	www.careright.au	• Tailored, flexible, integrated solutions with a primary focus on inpatient care (e.g., PAS, EMR, billing). • Cost-intensive option, less applicable to RACF-focused environments.	Not Shortlisted
7	Epic	www.epic.com	• Widely deployed EMR solution, primarily designed for inpatient hospital settings. • Standardised product offering with limited scope for small-scale customisations or proofs of concept. • Similar, large-scale vendor with a stronger existing Queensland Health (QH) footprint already in place, making Epic less competitive for this specific initiative.	Not Shortlisted
8	Five Faces	fivefaces.com.au	• Supports RACF telehealth and appointment management (e.g., SLHD use case). • Utilises Microsoft ACS backend, with proof of concept (POC) at Metro North for a "digital front door" initiative for outpatients. • Focused on enhancing customer access rather than traditional EMR or patient flow management. • User-friendly and interoperable, though not specialised for RACF or inpatient workflows.	Not Shortlisted
9	InterSystems	www.intersystems.com/au	• HealthShare platform focused on interoperability, real-time data exchange, and scalability. • Supports over 1 billion patient records globally, with deployments in complex healthcare settings like the U.S. Veterans Administration. • Local presence includes Mater, SA Health, WA Health. • "Data mesh" architecture enables flexible ingestion, standardisation, integration of patient data. • Health Connect Cloud for batch data exchange, patient portals, and collaborative workflows. • Flexible pricing models, offering tiered or user-based structures for cost management. • Robust/versatile solution, described as "Swiss army knife" for interoperability (Holland Hospital CIO).	Shortlisted
10	Leecare	www.leecare.com.au	• Platinum6 platform focused on aged care, offering interoperability, real-time communication, and critical features like data integration, clinical messaging, and reporting. • Intuitive interface designed for ease of use, minimising training time and improving user adoption. • Cloud-based and scalable, supporting phased rollouts and national expansion. • Customisable, cost-effective, all-in-one solution streamlines clinical and administrative tasks, potentially reducing operational costs.	Not Shortlisted

			• Limited engagement: Automated responses to emails; follow-up received on 6/11 but no substantial communication as of 13/11.	
11	Meditech	ehr.meditech.com	• "Expanse" EHR is primarily focused on hospitals and inpatient workflows. • Limited aged care experience or capabilities for separating patient flow functionality. • No significant capability in supporting RACF workflows or bridging communication between aged care and hospitals.	Not Shortlisted
12	Microsoft	microsoft.com/en-au/	• Existing usage of Microsoft Teams in Metro South Health demonstrates proven capability for communication. • Potential for integration and leveraging existing tenancy and resources, reducing infrastructure complexity. • May require a partner for implementation and adaptation to aged care-specific workflows. • Costs could be higher due to reliance on additional configurations and professional services.	Not Shortlisted
13	Orion Health	orionhealth.com/au	• User-friendly healthcare platforms with a focus on interoperability and care coordination. • Offers cloud-based solutions that reduce infrastructure costs while providing extensive functionality. • Significant experience working with Australian healthcare services, including PAS, EMR, and HealtheNet platform (eHealth NSW). • Features include shared care records, HIE, hosting telehealth, and writeback portal capabilities. • Strong integration with My Health Record and GP practices; collaborative worklists support care coordination. • Limited focus on logistics or patient flow functionality.	Not Shortlisted
14	Salesforce	www.salesforce.com/au	• Highly customisable workflows and user-friendly system through Salesforce Health Cloud. • Focus on patient relationship management rather than patient flow or logistics. • Proven expertise in API integrations and interoperability. • Existing footprint within Metro South Health, with 40–50 RACF implementations and previous demonstrations showcasing an end-to-end solution. • Ability to leverage existing infrastructure and professional services, reducing implementation complexity. • Additional costs tied to implementation and consumption rather than initial development.	Shortlisted

15	Teladoc Health	www.teladochealth.com/	• Primarily a service provider rather than a solution architect. • Focuses on delivering healthcare services rather than developing integrated systems for care coordination or data management. • Limited relevance to CAREPACT Connect's requirements for interoperability and workflow optimisation.	Not Shortlisted
16	Telstra Health	www.telstrahealth.com	• Offers tailored solutions for aged care and hospital sectors, potentially providing cost efficiencies compared to international vendors. • Focus on ease of use across platforms to enhance user experience. • Provides FHIR-native solutions, including support for aged care transfer documents aligned with federal requirements. • Health IQ PFS is outdated, raising questions about long-term support. • Partnered with Smile Health for FHIR-native platform capabilities. Aged care transfer documents to RACFs are available via My Health Record (MHR). • No virtual waiting room functionality currently exists; co-design would be required. • Lacks clarity on the communication process for RACFs not using integrated systems; reliance on manual lookup or call procedures may persist. • Transitioning from siloed applications to a central business unit, which may improve future support but introduces short-term uncertainties.	Shortlisted