

Clear Choice Health Plans

Takes Reporting From Two Weeks to Two Hours

The Challenge

Clear Choice Health Plans was founded on the desire to help people achieve improved health and well being by simplifying the healthcare insurance experience. Clear Choice's financial management system, however, was far from simple.

Its Sage MAS 90 ERP solution was cumbersome and inefficient for the processes and reports the company needed to complete. Recurring billing processes, for example, would span multiple days. Oftentimes, once one cycle was completed, it was time to start the next recurrence. Additionally, once the required information was retrieved from the solution, it wasn't in the format needed nor was it conclusive, causing even more inefficiencies. Even exporting the information into a Microsoft Office Excel® spreadsheet was painful.

It was apparent that Clear Choice, built on the values of Collaboration, accountability and innovation, needed a change in its business management software.

The Solution

The answer to Clear Choice's woes was almost by happenstance. The company first implemented Microsoft Dynamics® GP in its finance department, using it to integrate minor accounts receivable (AR) and accounts payable (AP) transactions from an outside billing system into its internal system. In short, Microsoft Dynamics GP was viewed only as a transaction extension of the billing system, and there was no intention of deploying the solution beyond the finance department.

However, as the AR and AP portions of Microsoft Dynamics GP were implemented, things changed.

"We saw the power and reliability of Microsoft Dynamics GP," says Evelyn Dunn, senior staff accountant at Clear Choice. "Users became believers." Believers indeed: Clear Choice decided to deploy the solution throughout the entire organization. Within six months, the implementation was complete.

Microsoft Dynamics GP, coupled with a relationship formed with Microsoft Gold Certified Partner Borek Business Solutions, has made all the difference.

With a tremendous product understanding of Microsoft technologies, a proven track record in implementing Microsoft Dynamics GP, and a deep commitment to long-term relationships, Borek was exactly what Clear Choice needed. The Borek team works closely with Clear Choice, sharing their knowledge and insight and identifying additional solutions and functional areas where integration to Microsoft Dynamics GP could enhance the company's overall operations.

Today, with 20 licensed users, Clear Choice processes everything – from financials and human resources and payroll, to purchase order processing and automatic bank reconciliation, and everything in between – in Microsoft Dynamics GP. Because of the flexibility of the solution, Clear Choice is able to integrate seamlessly to a number of other systems and applications, including ADP Payroll. And flexibility doesn't stop with the solution. "We're very fortunate to have Borek Business Solutions as our partner," says Dunn. "They're very, very responsive to our needs. We would try a lot of partners' patience, but the Borek team is able to handle all of the challenges we throw them in stride."



"We've achieved innovation because of the processes that Microsoft Dynamics GP automates for us and the expertise that Borek Business Solutions possesses. We know we've made the right decision in choosing Microsoft Dynamics GP and Borek."

Evelyn Dunn,
Senior Staff Consultant
Clear Choice Health Plans

“Certain recurring reporting functions once took up to two weeks to complete. With Microsoft Dynamics GP, it takes two hours. Two weeks to two hours; that’s simply amazing”

Evelyn Dunn, Clear Choice Health Plans
Senior Staff Consultant

The Benefits

Once Clear Choice implemented Microsoft Dynamics GP, its business management processes were soon running smoothly. Because of the solution, Clear Choice has realized vast improvements, greater efficiencies and increased collaboration in reporting and integration.

Comprehensive Reporting and Analysis

Clear Choice struggled with getting the right information to the right people in an understandable format. For example, the company needs to share financial information with its board of directors and managers, many of whom are not versed in accounting formulas or terminology. With Microsoft Dynamics GP, Clear Choice’s reporting frustrations are a thing of the past. The solution includes a number of pre-formatted reports, supports reporting with Office Excel and SQL Server analytical capabilities, and enables Clear Choice users to efficiently create and send reports in practical and compelling formats.

Better Business Productivity

Microsoft Dynamics GP has removed needless obstacles that once hindered the productivity, effectiveness and efficiencies of Clear Choice’s users and processes. Because all business processes are connected in one streamlined, flexible management infrastructure, Microsoft Dynamics GP enables Clear Choice users to complete their tasks at outstanding levels of productivity. “We’ve reallocated the resources we’ve saved in working on reporting issues and completing reporting functions to focus on deeper budgeting and analysis needs,” says Dunn. “And we’ve been able to devote more time to training employees, helping them to advance their careers.”

Empowered Users

Because Microsoft Dynamics GP provides a similar look and feel to software that people use every day – Microsoft Office Outlook, Microsoft Office Word and Excel – users are instantly comfortable with the solution. “Using Microsoft Dynamics GP couldn’t get much easier,” says Dunn. “It’s a natural transition.”

Looking Forward

Dunn notes that the future is hard to predict in the ever-changing world of healthcare. One thing she knows for certain, however, is that Microsoft Dynamics GP and Borek Business Solutions will easily accommodate any changes that come their way. “Microsoft continues to develop and enhance the solution, making the best even better,” says Dunn. “And I can’t say enough about the Borek team. They are simply top-notch.”

Web Site:

www.clearchoicehp.com

Customer Size:

More than 145 employees serving 40,000 residents throughout Oregon and Montana

Customer Location:

Bend and The Dalles, Oregon;
Kalispell, Montana

Customer Vertical Industry:

Healthcare

Customer Profile:

Clear Choice Health Plans Inc. is an innovative health insurance company that offers individual plans, Medicare Advantage plans, group plans, and administrative services, to individuals and businesses throughout Oregon and Montana

Software and Services:

- Borek Business Solutions Implementation Services
- Borek Business Solutions Integration Development Services
- Microsoft Dynamics® GP
- Microsoft FRx
- Microsoft Forecaster
- Encore Recurring Contract Billing
- Greenshades Center (1099 Reporting)
- JAT Payroll Interface to ADP Payroll
- Plexis PCM Billing System
- Unitime Systems Time Clocks
- Wellspring PrintBoss MICR Software

For more information about Clear Choice, contact (888) 863-3637.



Borek Business Solutions is a full-service business and information technology-consulting group that takes a systematic, collaborative approach to solving business and operational challenges. The company, headquartered in Eugene, Oregon, provides expertise and software solutions that improve a companies' efficiency, responsiveness & productivity, giving them a strategic advantage in their competitive environment and, ultimately, enhancing their profit potential.

To learn more, visit our website at www.BorekBusinessSolutions.com