



CareSource Turns to Velosio to Gain New Insights into Member Data

The Goal

- To have an impact on the life of members by assisting them to find financial and life related services with an end goal to be gainfully employed and move from financially dependent to independent.
- Be the first CareSource business unit to take advantage of cloud computing and bring speed, scalability, security and flexibility to the business.
- Move a manually intense new business initiative, in a short time frame with the ability to replicate across new state territories are secured.

The Challenge

CareSource lacked a centralized place to capture and manage member information (members, partners, community, activities, tasks, workflows, etc). There was also a lack of visibility to reports and dashboards to manage the member lifecycle, stay compliant with healthcare and privacy laws, and report back to state and government agencies. The goal was to move a workforce from a manually intense process to a state of the art high functioning system.

Client Overview



CareSource, a leading nonprofit managed care company based in Dayton, Ohio, started CareSource Life Services to help their members who were facing barriers finding or keeping a job. CareSource Life Services offers a new service to help members balance work and life and find a way to reach their dreams.

In order to help these members CareSource needed defined processes and an easy to use CRM system to track and manage their members to prosperity.



The Solution

CareSource implemented Microsoft Dynamics CRMOL in three months, including the following:

- Created new and flexible business processes aligned to Dynamics CRMOL that could be adjusted as this rapidly changing business grows.
- Organized and migrated a complex set of data from disparate sources (Excel, SQL, Etc.)
- Provided hands-on JAD session and end user training to drive rapid adoption
- Replicable solution to rapidly implement across future markets as new state contracts were secured.

Client Success

- CareSource has over 50 users who now spend their time managing and helping members achieve their life goals, rather than trying to manually track, record and report on activities, with a high degree of efficiency and productivity for the team.
- The original solution has been replicated and customized to adopt to the requirements in three newly contracted states.
- CareSource was so pleased with its internal team that they bestowed them the Heartbeat Award for delivering a remarkable system and process.

"I am completely blown away by the system! I have witnessed 3 different implementations of similar software that were a complete failure. Socius and the Microsoft Dynamics CRMOL solution exceeded my expectations by at least 200%."

-Karin VanZant , Executive Director



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