



Customer:
HealthyCT

Web Site:
www.HealthyCT.org

Location:
Wallingford, CT

Industry:
Nonprofit Insurance

Former System:
QuickBooks

Customer Profile:
HealthyCT is a member-run, nonprofit organization that provides healthcare insurance to individuals, families and businesses in the state of Connecticut.

Highlights:

- Flexible system executed vision
- Compliant with government requirements
- Smooth data migration from QuickBooks
- On time and on budget

CAL Business Solutions Inc.
860.485.0910
sales@calszone.com
www.calszone.com

Connecticut Nonprofit Insurance Startup Moves Smoothly From QuickBooks to Microsoft Dynamics® GP



The biggest benefit of using Microsoft Dynamics GP is flexibility. All I had to do was put my vision down on paper and we were able to execute it in Dynamics GP.

Chris Masi, CFO, HealthyCT



The Challenge:

HealthyCT is a member-run, nonprofit insurance co-op that was established in the State of Connecticut under the provisions of the Affordable Care Act (ACA). For the first year HealthyCT used QuickBooks. However, once the company received federal funding and began to grow, the CFO knew they needed a system with more functionality that could handle GAAP, operational reporting and the stringent regulatory requirements.

The Solution:

While some companies feel that Dynamics GP could be too powerful for a startup, CAL Business Solutions helped HealthyCT compare its options using points in the article, [9 Reasons A Startup Should Start with Dynamics GP vs QuickBooks](#). Based on a comfort level after speaking with CAL Business Solutions, HealthyCT chose to use Microsoft Dynamics GP for core accounting.

The Benefits:

“QuickBooks Data Migrated Smoothly”

Although HealthyCT had operated for a little over a year, in many ways it was still a start-up. “CAL had the experience that we needed in order to get the business off QuickBooks and going in that initial phase. They helped us reengineer the chart of accounts and really lay the groundwork,” recalls Chris Masi, CFO of HealthyCT.

In most cases when companies change accounting systems, they bring over a beginning balance and the net change each month. But HealthyCT wanted to bring in all the details at a transaction level, including analytical codes, that had been in QuickBooks for an 18-month period. This way, all its history would be available in Dynamics GP. Chris says, “And at the end of the day, all the data from QuickBooks migrated to Dynamics GP and it all tied out.”

About CAL Business Solutions

CAL Business Solutions is a Connecticut Microsoft Partner focused on Dynamics GP (Great Plains) financial management/ERP systems. The company offers implementation, data conversion, customization, training and support to over 275 customers in 26 states.

- Serving customers since 1982
- Multi year Microsoft Dynamics® President's Club Member, recognizing the top 5% of Dynamics Partners worldwide
- Microsoft Dynamics® GP Integration Experts
- Small company values, small company focus

“HealthyCT is a great example of a new company that realized the benefits of starting out with Dynamics GP early on to minimize the cost and disruption of conversion as the company grows.”

*George Mackiewicz, President,
CAL Business Solutions*

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CAL Business Solutions Inc.
200 Birge Park Road
Harwinton, CT 06791
860.485.0910
sales@calszone.com
www.calszone.com

“The Biggest Benefit is Flexibility”

Chris feels that the biggest benefit of using Microsoft Dynamics GP is flexibility. He recalls, “I put a tremendous amount of thought into how I wanted to build our infrastructure and manage the business as we got started. I knew I wanted to be able to take our financial data, and slice it and dice it, and look at it in 20 different ways from here to Sunday. All I had to do was put my vision down on paper and we were able to execute it in Dynamics GP. That certainly was satisfying.”

“Security, Controls and Audit Trails”

The version of QuickBooks that HealthyCT used was not GAAP compliant. Chris says, “Dynamics GP gives us security and audit trails that QuickBooks simply did not have.” With Dynamics GP security, user access can be limited down to the screen level in various parts of the system. And controls are in place so that, for example, when a transaction is voided, a series of steps produces an audit trail to show the “who, what, when and why” of each transaction.

“Analytical Accounting Satisfies Government Requirements”

HealthyCT used the integrated Analytical Accounting capability in Microsoft Dynamics GP to remain in compliance with government requirements. “Using analytical accounting we were able to satisfy the strict reporting required since we have a loan with the federal government. They need us to track progress against specific milestones from a financial perspective; but those milestones are organized differently from our regular account structure. Analytical accounting gave us a tool to not only track the milestones for the government reporting, but still account for it in the more normal course of business. It allows us to look at the business on a three-dimensional basis.”

“Good for a Start-Up and a Bigger Business”

Based on his experience, Chris commented, “I think in the context of a start-up organization that is looking for a substantial amount of growth, CAL Business Solutions is certainly able to accommodate both ends of the spectrum. On one side, Dynamics GP is a cost-effective solution for a start-up, but at the same time it is a solution that you can feel confident will grow with you and accommodate a bigger business down the road.”

“On Time, On Budget, Worked Out Perfectly”

Chris concluded by saying, “CAL Business Solutions has done a wonderful job. CAL has a passion for the application itself and brings that passion to the customer. CAL Business Solutions absolutely had the project done on time and on budget and it worked out perfectly.”

HealthyCT is a new state insurance co-op that made the smart decision to start out with a strong core financial system and is ready for continued growth.

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