



## FALL 2014

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### Notes from Nancy

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For the past several years, our focus was almost singular: the development and implementation of the Integrated Client Environment (ICE). Through the consolidation of different systems across different locations, ICE has made our organization truly one CoreSource. It improves our service and makes us better able to compete in today's competitive marketplace.

### Path Forward Project

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#### Client Migrations to ICE Come to a Close

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### Brand Refresh

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#### Revitalizing Our Brand with Color, Energy and Voice of Clients and Brokers

CoreSource has taken steps to update how it visually represents itself to brokers, clients, prospects and members.

### Client Spotlight

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#### Communicating ICE Migration to CHP Employees

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### Associate Spotlight

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#### CoreSource Hires Teri Swope-Shussler as Vice President of Operations, Northeast Region

In April, CoreSource welcomed Teri Swope-Shussler as Vice President of Operations, Northeast, which comprises our Lancaster, Penn., and Baltimore offices. Teri replaces newly retired Sue Houck, who was with CoreSource for more than 30 years.



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### **Encouraging Members to Enroll in Electronic EOBs: It's a Win-Win!**

Earlier in 2014, CoreSource ran a promotional contest to increase the number of providers registering for our portal. Its success inspired us to launch a similar promotion to increase the number of members enrolled to receive electronic Explanations of Benefits (eEOBs).

### **CoreSource Associate Anniversaries**

Here is a list of associates who celebrated milestones with CoreSource between March 2014 and September 2014.



## Notes from Nancy

### Time for the Next Exciting Chapter

It's time to write the next chapter in CoreSource history, and I know it's going to be an exciting one.

For the past several years, our focus was almost singular: the development and implementation of the Integrated Client Environment (ICE). Through the consolidation of different systems across different locations, ICE has made our organization truly one CoreSource. It improves our service and makes us better able to compete in today's competitive marketplace. The success of the project is due solely to the commitment of associates across our organization. I remain deeply grateful for all their hard work and dedication.

When the final round of client migrations was completed in June for the Detroit office, there was good reason for celebration. The goal of several years of efforts was finally realized. And, we can look back with pride on all that we accomplished through the spirit of teamwork that CoreSource associates possess. ICE truly represents the level of collaboration that will need to continue to deliver the efficiency and effectiveness that our customers expect. View our feature article to learn more about ICE.

While we'll continue to enhance our new environment as need demands, we can move forward to the next chapter which focuses on four key strategies I'll talk about further below.

### Healthy start for 2014

Our financial story is off to a healthy start for 2014. The great news is that, through August, CoreSource is well ahead of its financial plan for 2014. We forecast margin at \$10.8 million on a plan of \$8.7 million and revenue of \$122.7 million on a plan of \$117 million. I'm proud to report that we are poised for another successful year financially.

### Our strategy for the future

Like all Trustmark business units, CoreSource has created a three-year strategy that centers on four key components:

- 1. Operational Excellence:** Focus on advancing operational excellence, making the most of our best processes and services and creating a consistent and highly efficient process across all of CoreSource.  
Migrating all of our clients to ICE was critical in setting us up to achieve this goal. A team of our operational leaders across all offices have been working hard for several months to outline their initial recommendations on where to focus for greater efficiency and effectiveness throughout the organization.
- 2. Superior Customer Experience:** Provide a unique, positive and highly memorable experience for any of our customers that interact with CoreSource to make them each feel truly special to us.  
This strategy extends not only to phone interactions, but also to any written communications and all online experiences. Right now, a cross-functional team of people close to members, clients and brokers from all offices is being assembled to begin identifying where the initial areas of focus should be.



**Nancy Eckrich**  
President, CoreSource

**3. Development of New Products and Services:** Develop and offer creative, cost-effective products that meet the ever-changing needs of our clients and members.

With the ICE migration completed, we can turn our energy to focusing on growth and new product development. We will start by considering what we do well and look at how we can best use those tools in new and better ways for CoreSource, as well as in combination with products provided by our sister companies. We plan to put some disciplined processes in place to ensure we always have a pipeline of new products.

**4. Growth Through New Aggregator Clients:** Develop an approach to win new aggregator clients, or those for which we perform back-office functions in addition to claims administration similar to current clients, such as Nippon Life Benefits and Evergreen Health.

Our relationships with these clients are unique and longer lasting than typical clients and present a great opportunity to leverage our capabilities on a larger scale. We will proactively explore this segment of the market, determine where and how to focus our efforts and actively pursue clients in this space.

We feel these strategies will position CoreSource to grow and be the best health plan administrator in the industry.

### ICE nearing completion

Associates continue the migration of clients to ICE, the platform that enables us to make our great service even better and offer best practices across our entire organization. All eCams clients were migrated by early December, marking a significant milestone in the ICE project. Client migrations are divided into rounds, and three more rounds remain for the Detroit office, which is expected to finish in May. To date, Detroit has migrated 70 clients, with another 39, including some of its largest customers, scheduled for the final rounds. The importance of reaching our final goal cannot be overstated because ICE allows us to remain competitive in an ever-changing marketplace.

### What's ahead in 2014

As our bandwidth expands this year, we will be able to work on other important projects. We'll be upgrading underlying portal technology, and focusing on operational excellence. It is important to the success of our organization that we take our service-oriented model to the next level, and we'll explore ways to do just that.

Enterprise-wide initiatives will be an important part of our future. Like our sister companies, CoreSource is now using a process and methodology called Agile Strategy to develop a three-year strategy for our organization. Already, the Enterprise Leadership Team and senior CoreSource leaders have had several orientation and training sessions to learn how to use its tools and to develop the framework for our future strategy. In addition, when HealthFitness develops a new middle-market health and wellness product for its portfolio, we'll join Trustmark Voluntary Benefit Solutions in shaping the product for the enterprise and in taking the new solution to prospects and clients.

There's never been a better time to be at CoreSource. The future continues to offer so many opportunities for benefit administrators. With the investments that we've made in technology and training, I know 2014 will be a year to remember. Get ready for the great year that's ahead of us!

Best Regards,  
Nancy Eckrich  
President, CoreSource



## Path Forward Project

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### Client Migrations to ICE Come to a Close

The single largest technology project ever undertaken by CoreSource culminated in the successful migration of 350 clients to the Integrated Client Environment (ICE). After a \$30.3 million investment, the new environment consolidated five different systems. This allows us to continue to compete in today's marketplace with a platform for more functionality for our clients and members, while functioning more effectively as one CoreSource. As of Aug. 1, 2014, we surpassed 1 million portal sign-ins and 100,000 registered non-staff users, such as employees, dependents, clients and providers.

In June, the Detroit office migrated the final two clients – Ohio State University (OSU) and Catholic Health Partners (CHP) with a total of 59,000 lives. Migration of these clients, also the Detroit location's two largest, marked the end of the project to build ICE, implement its functions and migrate clients. Related work, such as decommissioning the legacy systems, is still in progress. Watching for ways to improve features and processes, and maintenance of the online environment is ongoing.

"Having all our clients on ICE puts us in a position to be one CoreSource," said Clare Smith, Executive Sponsor of the ICE project and Chief Financial Officer. "The development and implementation of ICE was an incredibly complex project, but our execution of the intricacies was very strong. It was a project that needed to happen, and we are proud of the new environment and enhanced functionality that we are able to offer to clients and members."

Kim Fiori, Regional President, Northcentral, already has seen the value of the efficiency of ICE when it comes to auto-adjudication of claims. Before the migration of clients began,, auto-adjudication in her region hovered around 9 percent to 12 percent, and is now reporting around 41 percent for those clients on the system, which exceeds the auto-adjudication goal set by the executive team for all of CoreSource of 40 percent.

Some Detroit clients have said they like the customized approach allowing the ICE client and member portal be tailored to them. "They have told us they appreciate that we can post their logo, use their branding and provide access to their documents on the client and member portal," Fiori said.

Like other CoreSource leaders, Fiori credited associates who use ICE as part of their day-to-day responsibilities with embracing change, stepping up to learn new procedures and essentially learning how to do a new job. "Our analysts whose daily responsibilities involve talking to members and processing claims have done an impeccable job," she said. "It's been rough being on the front lines with so much change to deal with. But they've really stepped up, and we're now focused on taking their service to the next level."

### ICE Highlights

- 1.7 million claims auto-adjudicated
- Maintaining records for 838,000 client lives
- Migrating 15.2 million claims' history
- The build out of more than 3,500 benefit packages



## Path Forward Project continued

Chip Sernyak, Regional President, Northeast, said he is proud of the service that associates are now able to provide clients and members. He also noted the region was able to keep client disruption to a minimum during the migration, which was completed in his region in December 2013.

“One of the best outcomes of this project is that we are all one CoreSource now, using the same online environment and working together as one organization,” he said. “We are on the right path, but there is still more work ahead. We need continued and enhanced training on using ICE, and we’re looking forward to the automating of more processes and procedures.”

Bill Ehlebracht, ICE program manager and Second Vice President, Project Management, CoreSource, said he has been involved with project management for more than 20 years, and ICE was his most challenging project. He said he couldn’t be prouder of his team’s can-do spirit.

“Our team had a great group of knowledgeable and dedicated people, and it made all the difference,” said Ehlebracht. “People rose to the occasion time and time again. When issues came up, there was always a ‘we-can-resolve-this-too’ attitude. Developing and implementing ICE and migrating clients was an incredible feat.”

Congratulations on a job well done!



## Brand Refresh

### Revitalizing Our Brand with Color, Energy and Voice of Clients and Brokers

CoreSource has taken steps to update how it visually represents itself to brokers, clients, prospects and members. Along with developing messages that better speak to our audiences and still reflect the strengths of our organization, our brand has been refreshed with a more colorful look and feel.

“Now that we’re welcoming a new era of service for our clients and members with the implementation of the Integrated Client Environment (ICE), we are able to direct our attention to how we present our organization to the marketplace,” said Steve Horvath, Vice President of Product Development and Marketing for CoreSource.

“Through ICE, we have been able to offer a new level of service across our entire organization. Now, we have a new look to accompany it,” he continued. “With the brand refresh, not only do new colors revitalize our look, but consistent messaging tells clients, brokers and prospects more about how we work and how our solutions meet their needs. The style is more contemporary. The message has more punch.”

The brand refresh will extend to all communications, including social media, PowerPoint templates, e-mail signatures, business cards and marketing materials. Three icons represent elements that differentiate CoreSource in the marketplace: actionable data, tailored plans and engaged employees.

Marketing materials have taken a new approach that feature the voice of our clients and brokers. The positioning speaks directly to clients and brokers about critical issues they are thinking about, and we highlight our response with the right solutions. A new healthcare reform website already bears the brand refresh. In the future, the brand refresh will be applied to our marketing site, CoreSource.com, and our member and client portals, myCoreSource.com and NGSCoreSource.com. Refreshing the brand on the websites are large projects, and we will keep you informed on the progress and implementation.





## Client Spotlight

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### Communicating ICE Migration to CHP Employees

In June, CoreSource migrated Catholic Health Partners (CHP), one of the largest clients managed by our Detroit and Columbus offices, to the Integrated Claims Environment (ICE). CHP is the largest health system in Ohio with more than 31,000 employees in more than 100 organizations in Ohio, Kentucky and contiguous states. CHP has seven regional markets, with some of them accessing their claims through a custom-created microsite.

Creating a communication to employees was CHP's priority in order to successfully prepare their employees for the migration to ICE. Working very closely with CHP, Client Management and marketing focused on developing a two-sided letter that would be mailed to over 14,000 employees enrolled in the health plan.

Using existing communications developed for other clients, the letter to CHP employees was customized to focus on the key messages CHP wanted to feature: explain the change to the portal, what functions members can still complete and what functions were enhanced—including easier access to customer service.

The teams successfully worked together to create and deliver multiple versions of the letters that allowed for small variations within CHP's regions, as well as an HTML that the client could distribute to their internal leadership staff—all on schedule.



## Associate Spotlight

### Robert S. Wolfkiel Joins CoreSource as Regional President, Southeast Region

In mid-May, we welcomed Bob Wolfkiel as Regional President of the Southeast Region. He succeeds our longtime leader Jerry Castelloe, who is transitioning to Vice President of Strategic Relations. Both Bob and Jerry are located in the Charlotte, N.C., office.

Prior to CoreSource, Bob was Vice President and Chief Sales Officer at Blue Cross Blue Shield of Rhode Island, and has served in multiple sales and sales leadership roles at Humana, Aetna, Willis and the Equitable. He brings 25 years of experience in the insurance industry to CoreSource, and he studied international business at Hofstra University in Hempstead, N.Y.

In his new position with CoreSource, Bob will have overall responsibility for the Southeast Region, including the Charlotte, N.C., and Little Rock, Ark., offices, and for ensuring world-class service to CoreSource clients and customers.

Coming into CoreSource, Bob recognized that we were a company with tremendous growth potential. "As new regional president, my number one priority is for my entire team to understand the CoreSource goals, both nationally and locally," he said. "Every individual needs to have a voice in our strategy to grow and drive the CoreSource value proposition."

Now having a couple months under his belt here, Bob is encouraged by the strong foundation of experience he has witnessed from those in his region so far, and knows that this strength can be leveraged in the development of new ideas and enhanced strategies that will generate consistent growth.

Bob has returned to Charlotte after living in Rhode Island and Atlanta. He has also called Nashville, Columbus and New York City home. Outside of CoreSource, Bob enjoys running, golf and spending time with his wife, Diane, an elementary school teacher, and athletic 14-year-old twin daughters Darla and Gabi.

As for Jerry, he recently celebrated 30 years with CoreSource and will develop and maintain strategic relationships with key clients, represent CoreSource in a government relations capacity, lead the enterprise sales support team, and continue as a member of the CoreSource executive leadership team in his new role.



Robert Wolfkiel,  
Regional President,  
Southeast Region



## Associate Spotlight

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### **CoreSource Hires Teri Swope-Shussler as Vice President of Operations, Northeast Region**

In April, CoreSource welcomed Teri Swope-Shussler as Vice President of Operations, Northeast, which comprises our Lancaster, Penn., and Baltimore offices. Teri replaces newly retired Sue Houck, who was with CoreSource for more than 30 years.

“We’ve brought on Teri to optimize our operations systems and processes, and take CoreSource to a new generation as one of the leading TPAs in the country,” said Chip Sernyak, Regional President, CoreSource Northeast. Based in the Lancaster office, Teri will be responsible for leading an operations team of 200 CoreSource associates between the two Northeast offices.

“CoreSource already has an outstanding reputation in the industry, and healthcare reform now offers us new opportunities,” said Swope-Shussler. “Much of what we’ll be working on in the Northeast region is positioning CoreSource to capitalize on these opportunities in the short and long term.”

Teri brings more than 20 years of experience in the health insurance industry to Coresource, most recently in executive positions at Boon-Chapman, the oldest domiciled TPA in Texas, and at FiServ. She earned a BBA in international management from The University of Texas at San Antonio, and plans to do volunteer work in Lancaster County, as she did in Texas, at CASA as a court- appointed special advocate for abused and neglected children.

Now, after being with CoreSource for almost six months, Teri has been encouraged by the lofty goals that have been established and has been impressed by the level of coordination and teamwork exhibited at all levels of the organization. She is confident that we are poised to make great strides toward building the best TPA in the nation.



## Associate Spotlight

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### Encouraging Members to Enroll in Electronic EOBs: It's a Win-Win!

Earlier in 2014, CoreSource ran a promotional contest to increase the number of providers registering for our portal. Its success inspired us to launch a similar promotion to increase the number of members enrolled to receive electronic Explanations of Benefits (eEOBs).

For four months, July through October of 2014, a corporate-wide promotion is running for CoreSource associates to encourage members to enroll to receive eEOBs. Here's how the contest works:

During a conversation with a member, CoreSource associates can use the following script as a guide to start the conversation about eEOBs:

"Please confirm your e-mail address for me. You will receive an e-mail with instructions on how to register at myCoreSource.com where you can elect to receive electronic EOBs. Please consider signing up. It's easy and electronic EOBs are secure, convenient and help to eliminate paper waste. Thank you."

Associates then send the member the e-mail message designed by CoreSource Marketing and Trustmark Corporate Communications. To be entered in the contest, employees are asked to include "CSPROVREG" in the BCC field of the e-mail to members. Each e-mail containing the correct code was an entry into the contest. There was no limit to the number of entries an employee can send. At the end of each month, five CoreSource associates were randomly selected to win a \$75 Target gift card.

Additional rules included:

The CoreSource associate must be employed at the time of the drawing.

Member e-mail addresses were verified.

Winning associate names in the CSPROVREG inbox were selected at random.

The inbox was cleared out before the start of the next month's contest.

#### **Congratulations to our July winners:**

Kimberly Blair, Columbus office  
Danyiel Miracle, Columbus office  
Lois Whitaker, Charlotte office  
Nicole Sudler, Charlotte office  
Valerie Newcomb, Kansas City office

#### **Congratulations to our August winners:**

Lara Carter, Kansas City office  
Herbert Brown, Kansas City office  
McKenzie Burns, Kansas City office  
Andrea Broussard, Kansas City office  
LaTanya Harris, Columbus office



## CoreSource News

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### CoreSource Associate Anniversaries

The following associates celebrated milestones with CoreSource between March 2014 and September 2014:

#### 30 Years

Michele Hove  
Debbie Duckworth

#### 25 Years

D Holland  
Maureen Abbott  
Dawn Deckard  
Janice Wall  
Kathleen Markovitch  
Teresa Griffin

#### 20 Years

Michele VanderWiele  
Cathleen Strutt  
Julia Johnson  
Cheryl Ward  
Theresa Peck

#### 15 years

Linda Hoffmeier  
Patricia Shewmake  
Brenda Demo  
Karen Reed  
Helen Abernathy  
Marie Carra  
Dzung Thomas  
Sandra Hayden  
Bonnie Llanos  
Lisa Bartram  
Susan Stosik  
Jamie Olack  
Suzanne Jones  
Kristy Mitchell  
Pam Tsapalas  
Kristine Downey  
Howard Roberts  
Kimberly Rogalski  
Malinda Bunch  
Carol Lawley

#### 10 years

Tom Hildebrand  
Karen Schmid  
April Rainey  
Romaine Diamond  
Andrea Charlebois  
Shannon Sherman  
Cheryl Reznick  
Sharon Larsen  
Kerri King  
Carlos Crespo  
Shawna Bradshaw  
Patrick Stewart  
Janet Graham  
Gwendolyn Hurst  
Derek Pannebecker  
Kerry Hunt-Tarquino  
Susal Paul  
Kim Fiori  
Brooke Bernhardt  
Brian Lutz  
Rita Montgomery  
Linette Crockford

**Thank you all for your years of service!**