

ShareVision

Social Services Software Re-imagined

Product Information

- Integrated Case Management
- Staff Management
- Accreditation Support
- Document & Content Management
- Collaboration & Communication Tools
- Custom Reporting Options

Manage people, services, and operating processes in the cloud.

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Last year, we were going through the accreditation process, and the use of ShareVision helped us receive the status of 'exemplary practice'.

Richard Faucher, Executive Director
Burnaby Association for Community Inclusion

The ShareVision team members have consistently demonstrated a willingness to listen to us and to work with us in order to meet our needs. Their response time and availability has been very good.

Ernie Baatz, Executive Director
Spectrum Society for Community Living

ShareVision is a very user-friendly product that is well-supported by capable account managers and accessible from anywhere internet is available. With no software to buy or extensive staff training to conduct, it becomes an affordable information tool for our staff, our Leadership Team and Board of Directors. Every year we discover new ways we can use it to streamline our business practices and increase our effectiveness in supporting children and adults.

Rick Hill, Executive Director
Community Living Owen Sound and District



ShareVision Overview

ShareVision Management Software provides a framework for service excellence, organizational responsiveness, and operational efficiency.

Created in collaboration with community service leaders, ShareVision's specialized case management architecture enables organizations working in Community Living, Child, Youth, and Family Services, Developmental Services, Employment, Education, and other community service sectors to manage people, services, and facilities under one unified management system.

The software integrates client tracking, staff management, and program and facility management. Integration enables a more holistic assessment of outcomes measurement and its relationship to service delivery. Measurable gains in operating efficiency are observed too. Integration reduces redundancy and complexity and enables information and process-sharing among all connected services.

ShareVision offers an ideal framework for supporting accreditation. Use the software's built-in library features and accreditation template to turn ShareVision into a virtual terminal for paperless compliance reporting.

A powerful feature set gives your team everything they need to get started. Adapt built-in content: ShareVision comes with editable forms, documents, surveys, calendars, reports. Upload content: Attach forms, documents and reports to client or program records. Create content: Specialized agency and government forms and reports can be duplicated in ShareVision. Personal logins, alerts, reminders, and announcements, permissions-based access, and flexible reporting options give administrators and staff tools for communicating, sharing information and records, collaborating, content management, and data analysis.

Operating requirements are simple. ShareVision is accessible from most internet-enabled devices using any standard Web browser. No additional hardware or software is required. Keeping it simple lets us create opportunities for a growing number of smaller organizations balancing resources with a need for data-management solutions in today's technical environment.

Help comes in an assortment of flavours. We've got a free, online help library for self-guided assistance, contextual help built right into the software, technical support, and a range of client services to assist you with questions, deployment, and custom site development.

ShareVision is inspired by a vision of community empowerment and purposed for a shared role in positively impacting human and community well-being, ability, development and opportunities.

The screenshot displays the ShareVision Essentials web interface. At the top, the 'ShareVision Essentials' logo and navigation path are visible. The main content area is titled 'Individual Details' for 'Hutchins, Jane'. On the left, a 'QuickStart' sidebar lists various navigation options such as Information, Fact Sheet, Contacts, Program History, Forms, Incidents, Documents, Plans/Assessments, and More Links. The main content area is divided into three sections: 'Announcements' with a welcome message and a 'Welcome to ShareVision Essentials!' notice; 'Individual Profile' with a photo and contact information for Jane Hutchins; and 'Individual's Schedule' with a calendar view and a 'view calendar' button. The bottom of the page features a date and time display (Monday, November 04, 2013, 10:26 PM) and three navigation icons for Home, My Individuals, and Programs/Residences.

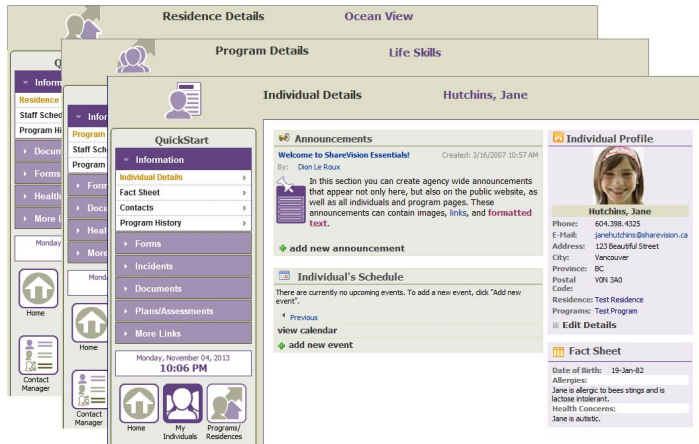


ShareVision Essentials

Macro Picture

Integrated Case Management

- Client Information Tracking
- ✓ **PLUS** Outcomes Tracking & Reporting
- Program & Residence Management



ShareVision's integrated case management framework enables operational efficiency and better organizational responsiveness. Integration eliminates redundancy and unnecessary complexity, leaving you with a streamlined and simplified system that is simple to use, navigate, and manage. Integration connects clients, services, resources, and staff, allowing you to monitor all areas of your organization from one central hub. Get alerts, post announcements, and mobilize action immediately, when you need to.

A centralized system also enables comparative data analysis, integrated reporting, and template sharing among services. Template sharing lets you create a form once and reuse it for all service types. Take the Critical Incidents form, for example. Start with a generic critical incidents form template and adapt it for use in programs and in residences.

Client Information Tracking

- Intake
- personal schedule
- case notes
- incidents
- assessments
- contact & relationship tracking
- program participation
- personal assets
- personal care plan
- medication profiles
- employment plan
- termination of service
- custom content

Overview of Essentials

Macro Picture

- Integrated Case Management
 - Client Information Tracking
 - ✓ **PLUS** Outcomes Tracking & Reporting
 - Program & Residence Management
- Staff Management
- Accreditation Support

Features

- Editable Forms, Surveys, Calendars
- Document & Content Management
- Collaboration & Communication Tools
- Reporting

Macro Picture

PLUS → Outcomes Tracking & Reporting

Track goals, indicators, influencing factors, and progress. ShareVision has several options for data collection. Whether you use forms or surveys, log case notes or evaluate with assessment records, ShareVision's date and user stamps enable you to track and measure change over any interval. Filter data to see specific details for one person, or for a group based on select criteria; or, use aggregate reports to identify trending factors among all supported individuals. Whatever your outcomes measurement methods, ShareVision has the flexibility to shine a light onto all areas of your service delivery.

Active Goals and Goal Progress					
Hutchins, Jane					
+add a new goal					
View	Goal Title	Program or Residence	Goal Added By	Goal Overseen By	Goal Type
View	walk a mile	ABC Grocery			Recreation & Leisure
View	Swimming lessons	OceanView	Paul Forcet	Paul Forcet	Exercise
View	Jane will prepare crafts	Woodshop	George Wentworth	George Wentworth	Vocational / Day Program
View	SPCA Volunteer	OceanView	Eileen Grady	Eileen Grady	Community Participation
View	Job Training	OceanView	Eileen Grady	Eileen Grady	Vocational / Day Program
View	Make friends	OceanView	Eileen Grady	Eileen Grady	Recreation & Leisure
View	Jane bakes	OceanView	Paul Forcet	Paul Forcet	Self Care Skills
Goal Progress (Job Training)					
+add a new goal progress to selected goal					
View	Date	Updated By	Progress Rating	Goal Frequency Achieved?	
View	4/2/2012	Eileen Grady	None	No	
View	3/29/2012	Eileen Grady	Excellent	Yes	
View	3/26/2012	Eileen Grady	Minimal	Yes	
View	3/22/2012	Eileen Grady	Excellent	Yes	
View	3/19/2012	Eileen Grady	Excellent	Yes	

Goals & Goal Progress

- ✓ goal type
- ✓ steps to achieve goals
- ✓ goal frequency
- ✓ personal outcomes
- ✓ achievement success
- ✓ goal progress notes

Unlimited Programs & Residences

Program Management

- program scheduling
- enrollment history
- incidents
- asset management

Residence Management

- residential care plan
- vehicle tracking
- asset management
- maintenance

Staff Management

Organize and manage employee information simply, and store it locally. Access records instantly and perform tasks quickly. Automation brings efficiency to daily tasks and helps minimize user error. Stay on top of events, training, certifications, incidents, time-off requests, and more with alerts, reminders, and content approval. Track staff activity. Connect employees with clients, services, facilities, external support resources, and fellow staff members. ShareVision does staff management for community services: integrated, as it should be.

- staff profiles
- multi-level user access
- personal shift schedules
- content approval
- surveys
- staff activity tracking

→ **Add-On:** HR Portal, Employee Services Portal, Survey Portal, Mobile App



Macro Picture

Accreditation Support

ShareVision offers an ideal framework for supporting accreditation requirements. Achieving accreditation requires rigorous effort involving implementing policies and procedures that meet your accrediting body's standards, documenting conformance to standards, and demonstrating evidence of compliance. ShareVision can help streamline both documentation of conformance and demonstrating evidence of compliance. Built-in, editable smart forms and the ability to upload and create custom content enables you to document strategic planning, policies and procedures, outcomes, input, daily activity, collaboration, and all other aspects of your service delivery. Use the software's built-in library features and accreditation template to turn ShareVision into a virtual terminal for compliance reporting.



Features

Editable Forms, Surveys, Calendars

The ShareVision case management framework has calendars and commonly used forms built in to client, program and residence portals. Create custom client or staff surveys using our survey template. Adapt included forms and calendars: edit field names, or add and remove fields. Easily replicate government forms or any of your existing agency forms using a wide variety of field types. Move content around or display content in multiple locations.

Content is included for your convenience, but it's always nice to know you can create new content as you need to.

Individual's Schedule				
Hutchins, Jane				
+ add new event				
< > December, 2013 Expand All Collapse All 1 Day 7 Week 31 Month				
Sunday	Monday	Tuesday	Wednesday	Thursday
1	2	3	4	5
8	9	10	11	12
15	16	17	18	19

Overview of Features

- Editable Forms, Surveys, Calendars
- Document & Content Management
- Collaboration & Communication Tools
- Reporting



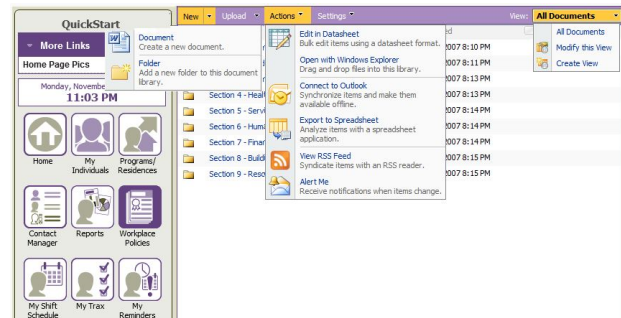
Features

Document & Content Management

Document Management

Microsoft Office integration gives you recognizable tools for managing all stages of a document's lifecycle. A familiar interface enables your staff to get started with very little training.

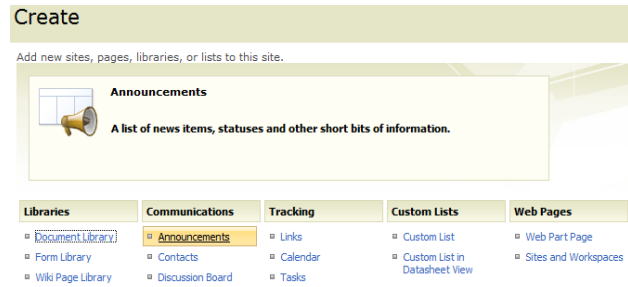
- up to 5 GB of storage
- range of file formats supported: text, graphics, audio, video
- tracking by author, creation date, and last modified date
- multi-level folders; unlimited depth
- permissions on select files or entire folders
- import/export
- attach documents to client/program/residence records
- alerts
- document templates
- enable and store incoming email
- admin toolbar
- dual user interface for admin and staff access



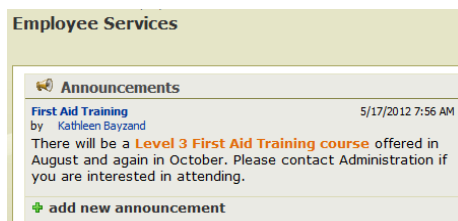
Content Management

Store, organize, distribute, create, and manage content on your site.

- upload and store photos, graphics, audio, video
- search: contact manager, site content index, site settings index
- sort, group, and filter records
- move, hide, or limit access to content; distribute data to multiple audiences
- create forms, document files, calendars, and surveys
- manage content with admin toolbars and contextual help
- recover deleted content from the recycle bin



Communication & Collaboration Tools



Announcements & Audience Targeting

Announcements help you get critical information and updates out quickly. Audience targeting enables direct communication to specified groups of users.

Features

Email Alerts and Reminders

Receive email alerts when content is updated on any form, document, or survey. Receive notification for all changes, new items only, or select changes. Create alerts for as many users as you want and choose the alert frequency: immediately, daily, or weekly.

Be reminded of upcoming certification renewals or inspection dates. Receive email notification on any date you specify.

Document Collaboration

[Versioning](#) enables tracking of all changes made to a document or form upon saving. Versions record the logged-in user and the date and time of the change. Review or restore previous versions at any time.

[Checkout](#) locks down a document while you are editing it so other users cannot override your changes.

Workflow → [Content Approval](#) automates the process of submitting content for managerial review. Perfect for staff time-off requests! Staff see only their own requests pending approval. Content Approval is available on most forms.

Reporting

ShareVision Essentials provides two options for reporting on your data.

Incidents					
Date and time of incident	Content Type	Individual	Program or Residence	Type of serious incident	
Program or Residence: Baking (4)					
Gender: Female (3)					
	Count = 3	Count = 3	Count = 3		
04/11/2009 12:00 AM	Critical Incident	Jones, Alison	Baking	Fall	
02/02/2009 12:00 AM	Critical Incident	Jones, Alison	Baking	Unexpected illness	
05/01/2010 12:00 AM	Medication Incident	Berry, Holly	Baking	Medication Error	
Gender: Male (1)					
05/01/2010 12:00 AM	Critical Incident	Smith, Bob	Baking	Aggressive/Unusual	
Program or Residence: Wood Shop (4)					
Gender: Female (3)					
Gender: Male (1)					

Ad Hoc Reports

Ad hoc reporting enables you to turn any form into a report.

Interact with data

Use sorting, grouping and counting features to organize and summarize aggregated data.

Apply filtering to focus on a subset of data.

Standard Reports

- ✓ Individual Details
- ✓ Goals & Goal Progress
- ✓ Incidents
- ✓ Program History
- ✓ Demographics

Custom Reports
with
ShareVisionCustom



ShareVision *Custom*

ShareVision *Custom* gives you more storage space, more features, and the freedom to scale, expand, and build on ShareVision Essentials with custom-designed features, custom reports, and custom site development.

More Forms

- ✓ Money
- ✓ Attendance Tracker
- ✓ Emergency Response Drill
- ✓ Accessibility Checklist
- ✓ Safety Inspection Checklist
- ✓ Site Inspection Checklist

Extra Portals

- ✓ Employee Services Portal
- ✓ Managers Portal

Staff portals provide tools and dedicated content each group needs for working in ShareVision. The Managers Portal is restricted to authorized staff. Add your own links, custom forms, documents, surveys, calendars, and announcements.

- ✓ Health & Safety Portal

→ **Add-On:** **Satellite Portals** enable information-sharing and controlled collaboration with contractors, families, and other external support resources.

Upgrade to ShareVision *Custom*

- ShareVision Essentials +
 - ✓ More forms
 - ✓ Extra portals
 - ✓ Double the storage space
 - ✓ Additional technical support
 - ✓ ShareVision Product Expert hours
 - ✓ Custom reports enabled
 - ✓ Custom development unlocked

ShareVision Custom

Additional Storage, Support, Service Hours, & Savings

	Custom	Essentials
✓ Double the storage space	10 GB	5 GB
✓ Additional technical support included	5 issues	3 issues
✓ ShareVision Product Expert hours (valued at \$575)	5	0

Custom Reports Enabled

Our in-house custom development team will work with you to create custom reports for any area of your service delivery. Recreate government reports or design specialized accountability reports to boards, funders, stakeholders, or accrediting bodies.

“Working with the ShareVision team, we developed several customized reports for management and for the Board of Directors, including Government Quarterly Statistics reports.”

Rick Hill, Executive Director
Community Living Owen Sound and District

Custom Development Unlocked

ShareVision’s modular design allows you to adapt, add, or remove Web page components so you can create a workspace that maximizes operational efficiency in your workplace. Add custom features, such as a donor tracking system, or custom modules. Expand your site with satellite portals for contractors, families, Board members, or other affiliated groups. Incorporate workflows to automate multi-step administrative processes. Our in-house developers are more than just pretty faces; they are technical artisans creating signature, integrated systems, by request, one customization at a time.

What’s your vision?

Create it with:

- ✓ Custom features
- ✓ Custom modules
- ✓ Workflow automations
- ✓ Site modifications



Benefits

Low Risk

Access ShareVision from almost any internet-enabled device. No additional hardware or software is required for annual subscriptions. As long as we are hosting your software on our servers, we will take care of server security and technical maintenance so ShareVision stays up-to-date and enabled for optimal performance. And just so you know, any data you store in ShareVision belongs to you, even if you choose to terminate your subscription.

Affordable

Start with ShareVision Essentials and master the basics. It is easier to manage, and with a lower, up-front cost, it's easier on your budget. Get add-on features, as you need them. Build as you go, and pay for only what you use. Upgrade to ShareVisionCustom at any time for use of the full feature set and maximum customization opportunities.

Easy to Use and Manage

ShareVision requires very little training for the average user. Staff will find recognizable Microsoft Office tools for working with documents and forms. Administrator resources include a site content index, a site settings index, templates, user profiles, a Content Creation centre, contextual help, and a full online library of help information.

In addition to Microsoft Office integration, a QuickStart side-navigation bar, toolbars, and dropdown menus help users locate, add, and edit content quickly and easily.



Overview of Benefits

- Low risk
- Affordable
- Easy to use and manage
- Secure
- Enables operational efficiency
- Adaptable
- Scalable & expandable
- Help at your fingertips



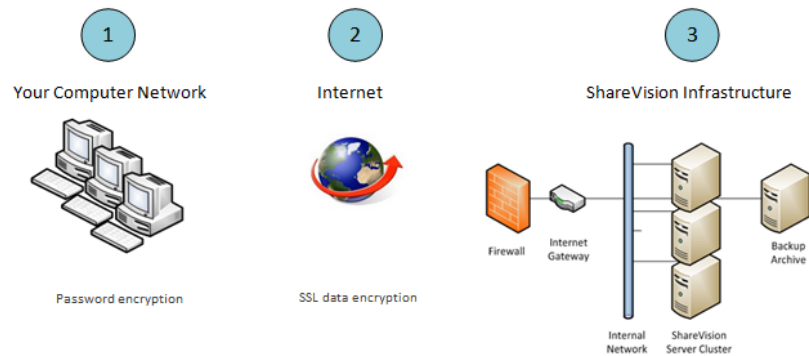
Benefits

Secure

Multiple security features protect your data from the outside world. Permissions ensure client information remains confidential within your organization.

3 Security Features Protect Data from the External World

1. Password protection
2. SSL data encryption secures information communicated over the internet
3. ISO compliant infrastructure in place for server security



Permissions Preserve Confidential Information Internally

Administrators have complete control over what staff can do with content they are able to access. Guests, for example, may only be able to read select content or have access to a single survey.

Permissions establish a multi-level user interface for front-line staff, managers, administrators, and guests.

What's a Multi-Level User Interface?

What staff can see and access when they log in to ShareVision depends on their assigned permissions. Front-line staff typically see only clients, programs, and residences they work with. Managers may see additional icons leading to limited-access areas general staff are not authorized to enter. Administrators have full site access and unrestricted views of organizational data and available tools and site settings.

Enables Operating Efficiency

It's not often a lunch area is abuzz with praise of an organization's operating efficiency. More familiar is the comparison of how long it takes people to perform some aspects of their job. Improved operating efficiency helps everyone on your team to work more confidently, and reduces stress and instances of injury and error. That results in a happier workforce, higher productivity, and a not-too-shabby ROI in several key areas. You may never hear the words, "Thanks for the workflow!" but staff will be happy to talk about other things at lunch.

Benefits

Migrating your paper-based system to an online, digital environment, connecting clients, services, and staff in an integrated data management framework, and employing workflow automation can help you achieve measureable efficiency gains. Here are a few benefits.

Complexity Reduced

- Processes are integrated into a unified management framework.
- Unified systems are simpler and easier to use and manage.

Redundancy Eliminated

- Consolidation strips away extraneous bureaucracy.
- Data sharing becomes available across a unified platform.

Fewer Resources Required

- Automated workflows make manual processes more efficient, less prone to errors, less time consuming, and less labour intensive.

Greener Business Practices

- reduced paper consumption
- less waste
- less required office space
- less required storage space

Adaptable

Log in to ShareVision from your PC, Mac, phone, or tablet using any standard internet browser. Customize content: Edit field names, or add/remove fields as you need to. A range of field types enables you to replicate government forms and any of your existing agency forms. Add features and additional data storage, as you need it. ShareVision*Custom* enables full customization opportunities.

Scalable & Expandable

With ShareVision, you can have as many users, clients, services and facilities as you can fit into your database. Additional storage packages are available for unlimited scalability. Expand functionality with add-on features; or, upgrade to ShareVision*Custom* for unlimited custom development opportunities.

Help at your fingertips

An online help site is available to all ShareVision users for self-guided assistance. Contextual help assists you with finding relevant help topics for each area of ShareVision. Client Services include:

- Technical Support
- Consulting & Technical Services
- Guided Deployment
- Training

Client Services connect you with ShareVision Product Experts who can assist you with strategic planning, best practices, learning, troubleshooting, business solutions, and custom development.



Purchasing ShareVision

ShareVision Management Software is available three ways.

ShareVision Essentials	ShareVisionCustom	ShareVision License
Annual Subscription	Annual Subscription	Perpetual Use
Web hosting by Breakwater Designs Ltd.	Web hosting by Breakwater Designs Ltd.	Self-Hosted
Essential Features Version	Full Feature Version	Full Feature Version

Request a consultation to see if ShareVision is the right fit for your organization. Contact us to receive a personal invitation to our demo.

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 ShareVision Sales
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A Little About Us

Since 2004, we have worked with organizations nation-wide in a growing number of community service sectors. We have helped over 100 agencies migrate from paper-based management systems to online, automated environments.

We focus on integrated solutions that help you achieve measurable efficiency gains through streamlined operating processes. We provide a range of flexible customization options because we value inclusion and diversity of needs and choices. We welcome feedback so that we can fix things when they don't work, so that we are able to respond to current industry directives, and so that we can provide the best client care, technical support, and training services possible.

From BC to Newfoundland, in places large and small throughout Canada and the US, organizations using ShareVision are as diverse as the individuals they support. But what each has in common, and what they all give back to us, is a chance to have a shared role in positively impacting individual and community well-being, ability, development, opportunity, and empowerment. We are happy and honored to be a part of that cycle and proudly rise to its ongoing demands and rewards.

ShareVision is a division of Breakwater Designs Limited, a global provider of Web-based, custom information-management software.

