ShareVision

ShareVision

Information-Management Software
See the whole picture.

Get to Know Us

Integrated Case Management, Outcomes Tracking, and Program and Residential Services
Streamlined Business Processes
Document & Content Management
Collaboration & Communication Tools
Practical Reporting Options
Multi-Level User Interface & Dedicated Staff Resources

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

Contents

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 is web-based, information-management software for organizations providing social services. It 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.
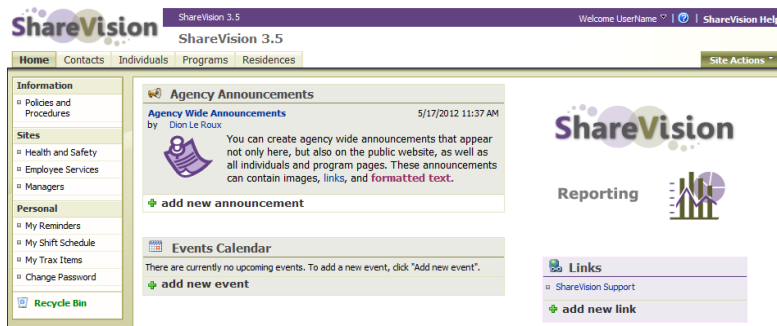
The software enables Community Living agencies, Child, Youth, and Family Services agencies, Boys and Girls Clubs, and other community and multi-service organizations to manage people, services, facilities, and business processes under one unified management framework.

ShareVision integrates case management, outcomes tracking, and program and residential services. Integration improves efficiency by consolidating common processes within a multi-service infrastructure. The software's modular design enables smaller agencies with fewer service types to adapt or remove unneeded components that don't fit with their service delivery model.

Business processes will benefit too. ShareVision adds efficiency through automation, enables greener business practices through reduced consumption and waste, and simplifies your administration by providing a more streamlined system that consolidates common processes and strips away redundancy.

Editable content and adaptable components give you the flexibility to take ShareVision in any direction you need to. ShareVision comes with forms, surveys, calendars, document repositories, and other resources for outcomes tracking and implementation of standards for case management practice.

ShareVision has 3 practical options for reporting on your data. Get an instant snapshot of how things are going, a more comprehensive overview of service delivery, or have us build you a custom accountability report for boards, funders, government, and accrediting bodies.

Operating requirements are simple. ShareVision is available across multiple platforms. It may be accessed from any internet-enabled computer or mobile device meeting minimum system and browser requirements. Hosted software does not require any additional hardware or IT investment. ShareVision data is protected under 3 layers of security: password encryption; SSL encryption; and server security for hosted software.

ShareVision software is fully supported. To help your organization transition to a ShareVision system, we'll pair you with a personal project manager who will be available to your team right from day 1. You'll also receive unlimited technical support from in-house client care specialists, access to an online help manual for self-guided training, and access to training courses for your administration team, and when the time comes, for your staff orientation to ShareVision.

Chapter: ShareVision Overview

ShareVision Foundation Features

Integrated

· Case Management
· Outcomes Tracking
· Program and Residential Services
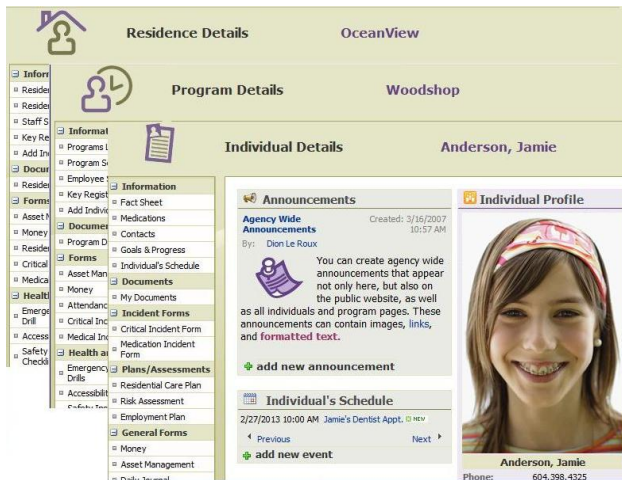
ShareVision uses integration to create a more streamlined infrastructure that's easier to use, navigate, and manage. Modules that are not required may be removed or adapted as needed.

Managing multiple services under one centralized system is not just simpler and easier, it also enables comparative data analysis, integrated reporting, and template sharing. 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.

Case management features enable recording and tracking of

- ✓ personal information
- ✓ personal schedule
- ✓ personal care plan
- ✓ case notes
- ✓ incident occurrences: critical, medical, staff accident and injury
- ✓ risk assessment
- ✓ safety policy and procedures
- ✓ family and external support relationships

- ✓ program participation
- ✓ money transactions
- ✓ personal assets
- ✓ associated long-term care facilities
- ✓ medication profile
  - o Medication type, dose, dose instructions, prescribing medical professional, prescription date and any other noteworthy information.
- ✓ employment plan
- ✓ termination of service

Overview of Features

→ Integrated
  · Case Management
  · Outcomes Tracking
  · Program and Residential Services

→ Forms, Surveys, Calendars, Linked Sites

→ Document Management

→ Collaboration & Communication Tools

→ Practical Reporting Options

→ Multi-Level User Interface & Dedicated Staff Resources

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	

Outcomes tracking and reporting

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

Manage an unlimited number of programs and residences.

Program Management
- ✓ program scheduling
- ✓ program history and attendance reporting
- ✓ incidents
- ✓ asset management
- ✓ money tracking
- ✓ safety checklists

Residence Management
- ✓ key registry
- ✓ vehicle tracking
- ✓ asset management
- ✓ maintenance
- ✓ site inspections
- ✓ accessibility checklist

Forms, Surveys, Calendars, Linked Sites

The ShareVision Foundation comes with a selection of preconfigured forms, surveys and calendars. They can be used as-is, so your team can get to work right away, or personalized and adapted as needed.

External partners can interact with your ShareVision site too. Add a sub-site, like the Board site, extranet sites for external support groups like medical professionals or donors, or a ShareVision public site and link them all to your main ShareVision site.
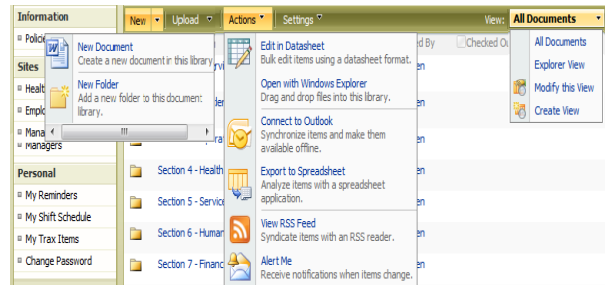
Document & Content Management

As we move towards an increasingly paperless business environment, integrated document and content management become essential features of information-management software. They allow you to store, organize, create, edit, move, and publish documents and other types of content on your site.

Document management in ShareVision is easy for the average user. Toolbars, dropdown menus, MS Office integration, and intuitive administrator settings provide a user-friendly interface and familiar tools for managing all stages of a document's lifecycle.

How does it work?

- · up to 10 GB of storage
- · multiple file types supported
- · security set on libraries or specific documents
- · documents organized in multi-level folders
- · documents tracked by author, date and time of when they were creation and last modified

Chapter: ShareVision Foundation Features

File management

- import/export documents
- send documents to outlook or to a custom destination
- create views to organize documents by audience, program or service
- store incoming email
- receive alerts for newly added or modified content
- use a workflow to manage a document process
- create document templates

Communication & Collaboration Tools

Announcements & Audience Targeting

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

Email Alerts and Reminders

Set up an alert on any form, document, or survey and choose what to receive alerts for: all changes, new items only, or select changes. Choose when to receive alerts: immediately, daily, or weekly. Send alerts to as many users as you want. Create a reminder for certification renewals or inspection dates and receive email notification on any date you specify.

Document Collaboration

- Versioning tracks each time changes made to a document or form are saved, noting the author, date and time of the change. Previous versions are restored at any time.
- Check-Out locks down a document for editing so other users can't override changes.
- Content approval

Practical Reporting Options

ShareVision provides 3 options for reporting on your data.

Ad hoc reporting

Summarize, evaluate, and interact with data on a per-form basis for a quick internal check on recent activity and performance.

Choose from a selection of Popular Reports

· Manager's Dashboard
· My Month

· Critical Incidents
· Demographics

Manager's Dashboard helps you:
- ✓ Monitor all levels of operation in a glance.
- ✓ Track progress and follow trends.
- ✓ Be informed about current conditions and respond instantly to any situation.
- ✓ Identify areas and people requiring service.
- ✓ Forecast budget requirements and resource allocation.

Custom Reports

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.

Multi-Level User Interface & Dedicated Staff Resources

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

That means, when users log in to your ShareVision site, they'll only have access to the clients and services they work with and to pages and content they're authorized to see.


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.

Dedicated Staff Resources

· Employee Services
· Managers
· Administrators

Permissions give each staff group access to their own page. Each page contains links and tools each staff group needs for working in ShareVision.
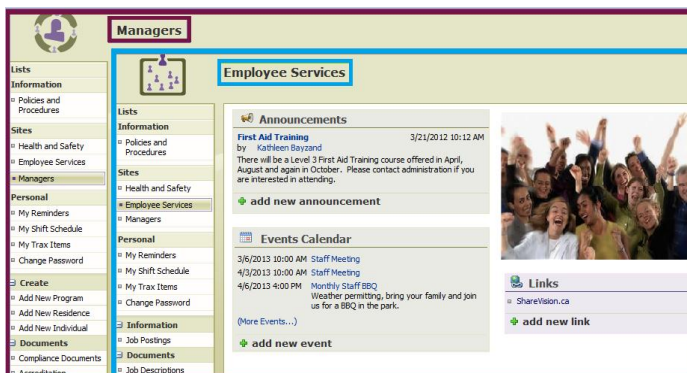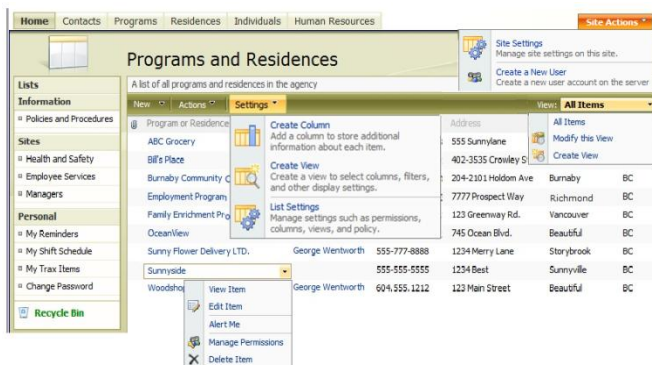
Benefits

3 Levels of Data Security

ShareVision data is protected on your computer network by password encryption. SSL data encryption ensures information communicated over the internet. Hosted servers are secured by industry-grade firewall protection, IDS security, daily data backups, secure data archiving, disaster recovery solutions, and fortified storage facilities with redundant connections to power and communications.

All your data collected and stored in your ShareVision site belongs to you and is available to you for export to other systems at all times.
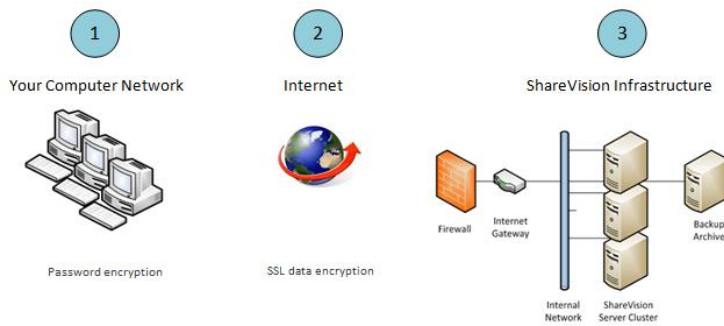
Easy to Use and Manage

An intuitive user interface enables your team to work in ShareVision with very little training. They'll be able to locate content quickly and easily using navigation tabs, a quick launch navigation bar, toolbars and dropdown menus. Built on a SharePoint platform, ShareVision includes familiar MS Office tools for working with documents and forms, making it easy for the average person to use and less of a strain on your organization's training budget! A site directory, content index, templates, user profiles and usage analytics enable administrators to manage global settings, create new content and monitor site activity and properties.

Overview of Benefits

→ 3 Levels of Data Security
→ Easy to Use and Manage
→ Streamlined Business Processes
→ Fully Customizable
→ Minimal Resources Required
→ Fully Supported

Streamlined Business Processes

Ever notice that people rarely comment on something unless it's not working as they expect? A rave about efficient business processes is seldom heard, but the lunchroom is often full of talk about how long it takes people to do their job duties. Streamlined business processes aren't just better for your bottom line, they help everyone in your organization do their job quicker, easier and more effectively. Your employees may never say *Thanks*, but they'll be happy to talk about other things at lunch.

ShareVision improves business processes through integration, automation, and greener business practices. Here are just a few of the benefits and outcomes.

| Complexity Reduced	Redundancy Eliminated	Fewer Resources Required	Greener Business Practices
· Processes are integrated into a unified management framework. · Unified systems are simpler and easier to use and manage.	· Consolidation strips away extraneous bureaucracy. · Data sharing becomes available across a unified platform.	· Automated workflows make manual processes more efficient, less prone to errors, less time consuming, and less labour intensive.	· reduced paper consumption · less waste · less required office space · less required storage space

Fully Customizable

Get ShareVision any way you want it. Choose your site theme, install your logo, and add your own images and links to personalize your site. Built-in forms, calendars, surveys, or document libraries may be adapted as needed. An open architecture design gives the software scalability and interoperability with other web-based applications.

Create Content

Creating content is easy in ShareVision. Start from the Create page to build your own forms, document libraries, calendars, surveys, specialized pages, and more.
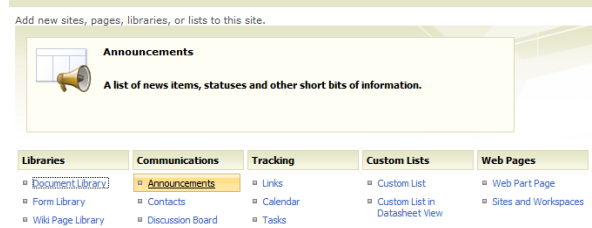
Customize Modules

ShareVision's modular design enables adapting, adding or removing web page components as needed so you can have everything you need to work in ShareVision at your fingertips.

Build and Scale

Build on the ShareVision Foundation with add-on features, performance-boosting upgrades, new tools or a dashboard report. Add sub-sites for board members, volunteers, and family members. Build an extranet site for external partners and support groups such as contractors, medical professionals, and stakeholders.

Our in-house custom development services are available at your request. We can help you customize the ShareVision Foundation interface, implement workflows, create custom reports, or build you a custom module.

Fully Supported

We know that taking on a new information-management system is a big deal. To help with your transition, we'll assign you a personal project manager who will be available to your team from day one. You'll also have in-site access to our online help manual. And if you get stuck, unlimited technical support from in-house client care specialists is just a phone call or email away.

Your personal project manager can help with

- your first steps
- planning a strategy for implementation
- moving from paper to digital
- importing data
- customization

Minimal Resources Required

ShareVision software can be hosted on our servers (a Breakwater Designs-hosted solution) or on your servers (a self-hosted solution). No additional hardware or IT investment is required for Breakwater Designs-hosted solutions. We take care of everything you need to run ShareVision, including all required server hardware, software licenses, and technical support for maintaining service to your site. We'll also back up your data for you.

With Breakwater Designs-hosted solutions, regular server maintenance and upgrades ensure ShareVision remains up-to-date and delivers consistent performance as business environments and technology evolve over time.

Purchasing ShareVision

ShareVision software is available by annual subscription or by license. Licensing gives you perpetual use of the software and enables hosting the system on your servers. When deciding between subscription or licensing, your organization's size, its resources, and long-term information-management requirements will be the most important considerations.

To help you choose a model that's right for you, we invite you to contact us for a free consultation, for any questions, or attend a free demonstration webinar.

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A little about us

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

Since 2004, we've been helping organizations transition from paper-based management systems to a software environment. We focus on converting your paper forms into online equivalents, on streamlining your operating processes, on automating your manual processes and on ensuring you have options and tools for making ShareVision work just right for your organization.

There's nothing more frustrating than having a product that doesn't work for you after all, that is confusing to use, or that you can't find help for. That's why we make it our priority to spend time talking to people before and after they begin using ShareVision. We want to know what organizations need to work effectively in today's business environment. We welcome feedback on our user's experience so that we can fix things when they don't work, so that we're better able to deliver custom solutions that recognize and adapt to each organization's unique needs, and so that we can provide the best client care, technical support, and training services possible.

We're proud to provide software that helps organizations support the wellness of people and communities across North America.

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