

Texas Council On FAMILY VIOLENCE



Osnium-Texas FAQ

The following are the most common questions we have identified and received about Osnium-Texas. If you do not find your answer in this document, please refer to Osnium's documentation as well as the guide (*Your Guide to Osnium-Texas*) we have created. The questions and answers are arranged in the following order:

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Getting Started

System Requirements:

Q: If we utilize Windows Server 2012 can we use a newer version of SQL instead of Microsoft SQL Server 2008 R2?

A: *In this situation, you can use the newer version of SQL.*

Q: Can we use SQL Enterprise instead of SQL Express?

A: *Yes, it will work on SQL Enterprise without any problems. SQL Express is suggested because it is free.*

Q: What are the storage requirements?

A: *For agencies not using the file attachment feature, it is suggested to allow 1 to 2 GB for the database. If you plan on using the file attachment feature, the database will use as much space as a regular drive in addition to the 1 to 2 GB.*

Q: How does my data get entered into the system if I have a satellite(s) office?

A: *For the system to work, it must be able to communicate with the database host (server). For this to work at a satellite office, there are a couple ways to use the system.*

The first solution would be a VPN. VPNs allow you to connect to the same network as the database machine. VPNs work through the Internet so that means that communications to the server will be limited by the speed of your Internet on both sides. VPN is much slower than remoting into the main office to use it.

The second option would be dependent on the situation. If there is only one person at the satellite office and there is a free computer that no one is using at the main office, then the person at the satellite office could use remoting software like RDC to connect to the unused PC inside the main office's network and use it that way.

The third option would be to have a terminal services server setup at the main office, and have any staff at satellite locations connect to the terminal services server with RDC. This setup is able to handle a larger number of staff at satellite locations.

In all situations please consider security precautions as you will have confidential data. Work with your IT expert to address safely using these mediums.

Q: Does the server install need to happen at the satellite offices or just at the main office?

A: *The server install only needs to be installed on the machine that is going to be storing the database, normally the main office.*

Q: How are changes to the database distributed?

A: *It depends on what you are changing or updating. Layout changes are distributed as an .OSM file that can be pushed to all users by the Administrator. Changes to drop downs are sent as a new database, a script, or instructions to be manually changed. Programming changes require a new copy of the database that replaces the old one on each workstation, and this does not happen often.*

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Roles & Permissions

Q: Is there a way to designate that the person providing the service was a volunteer?

A: *You can set your volunteers up in the same area where you set up staff and indicate that the individual is a volunteer. This is covered in the third training webinar if you would like to revisit it.*

Q: Will we be able to limit or expand access to different users?

A: *Yes, you will be able to limit the permission levels for your users. This is covered in the third training webinar if you would like to revisit it.*

Q: Are there privacy settings on the Case Notes tab? For example, can a case manager's notes only be seen by their supervisor and not the other counselors or case managers that may not directly be working with the client?

A: *This can be accomplished when assigning a staff role. There are options for read all and for private settings.*

Q: What safeguards will prevent a staff member from accidentally deleting a client?

A: *It is difficult to accidentally delete a client since the system asks more than once if you are sure that you want to delete. The last prompt asks you to check a box saying you agree that you want to delete.*

Q: What can the Administrator do, generally?

A: *The Administrator has the capability to make agency-wide system and layout changes. Items that your other staff members can edit/create/delete can be chosen when you are setting up your staff members in the system. The third webinar focuses on the different roles if you would like to revisit it.*

Q: Can Almost Administrator add to the drop downs?

A: *Yes, they can add to the drop downs. The Almost Administrator can do almost anything except change the*

layout of the system.

Q: What do the different permission roles mean?

A: *Below are the definitions for each of the roles you will encounter in the system:*

- *Read- objects of the current type are readable. To make an object read-only, check the Read operation and uncheck the Write operation.*
- *Write- objects of the current type are editable.*
- *Create- new objects of the current type can be created.*
- *Delete- objects of the current type can be deleted.*
- *Navigate- views that display objects of the current type can be opened via the Navigation System, and when the Navigate operation is not granted the corresponding navigation item is unavailable.*

Q: Can there be a Staff account that cannot delete clients?

A: *As an Administrator, you can go into the permission levels and decide if you want your Staff (limited) role to be able to delete clients or not.*

Q: What is the difference between Volunteer No Access and Volunteer Read Only Access?

A: *The Volunteer No Access cannot login into the system. The Volunteer Read Only Access can login and just view data in the system.*

Q: If you make someone an inactive staff member, will they still show up as an option in the staff drop down on the Service screen?

A: *You will still be able to choose them from this drop down, but if you delete them from the system then they no longer will be an option.*

Q: Will inactive staff members remain on some kind of master list indefinitely?

A: *Inactive staff members will still show on the staff list, but deleted staff members will not.*

Q: Can a staff member be re-activated?

A: *Yes, simply uncheck the inactive box and save your changes.*

Q: Can you un-delete a staff member?

A: *There is a recycling bin under the Tools menu where it is possible to un-delete a staff member (or any item that has been deleted), but there are pros and cons to it. It will not completely restore items fully to how they were before. The recycling bin is a last resort.*

Q: Can an administrator determine who has deleted a client or performed other data entry?

A: *Yes, through the audit trail the Administrator can see who performed what type of data entry. The recycling bin can show you the deleted item and who deleted it.*

Q: Who has access to the audit trail?

A: *This is determined by the permission level set, and the default is for the Almost Administrator and Administrator to have access to it.*

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Client Screen

Q: What is the difference between Pseudonym and Preferred Name?

A: *Preferred name is what that survivor would like to go by and is for your agency's purpose. Pseudonym is one of the items ITS collects on the client. ITS requires you collect one of the following: Pseudonym, Last Name, or the Client File Number.*

Q: Can we use number codes instead of the names of the counties?

A: *Potentially yes, and one suggestion is to pre-fix the county names with the number codes you are utilizing. This way you can use your numbers, and reports will come out showing the county names.*

Q: What is the preferred format for entering ages less than 1 year?

A: *Please enter the date of birth for any client or child, and the system will calculate the correct age.*

Q: If a client has a mental disorder, should we add that under "other" or nothing at all?

A: *We suggest you continue reporting the way you are currently and how the survivor identifies.*

Q: If we accidentally type over the original intake date will it get changed?

A: *It should only change it permanently if you click on save. If you accidentally do this, hit cancel or close the screen and do not save and then open that screen back up.*

Q: If we accidentally change the intake date and save it can we restore the original intake date?

A: *There is no undo button if you change the date and also save it. You can go into the audit trail and try to retrieve it from there.*

Q: Can the original intake date field be set as a field that cannot be edited without administrator permission?

A: *To do so would limit the person entering data from entering the Intake Date. You could possibly set the Intake Date to default to the current date but may cause issues with back-entering data.*

Q: How do you put in a different intake date? For example, what if a client leaves the shelter and then later returns?

A: *We understand that in ITS the intake date stays the same at all times and references the very first time a survivor sought services. We know that does not have much utility though and so the entered services should offer additional dates of actual intake. For example, choosing the service of 'Orientation' would in effect document intake. You can also select a new victimization date from that screen.*

Q: Can the system auto-populate the Child/Secondary screen with, for instance, the same address as the Primary Client?

A: *Yes, the only information that is filled in automatically on the Child/Secondary screen is the Primary's address. The phone number and other information on the Child/Secondary screen needs to be manually entered.*

Q: Can a Child/Secondary client be linked to two Primary clients?

A: *No, the system allows you to link the Child/Secondary to one Primary client. If this situation arises, one Primary client would need to be chosen.*

Q: If a secondary client becomes a primary client due to her own victimization, do we enter that client as a new primary client?

A: *Yes, create a new primary client. If you wish you can change the existing secondary to a primary, but then*

they will no longer appear or be counted as a secondary. To do this From the Tools Menu, you can use the Change Type option to change a client from Secondary to Primary. Data entered will be carried over, but fields not present on the Secondary client screen will need to be populated after changing the client type.

Q: How can a secondary client become a primary client while maintaining the integrity of the original secondary data? Can a client be both a secondary and primary client with the same ID?

A: *A client cannot be primary and secondary at the same time. If this happens they will have two client records with different IDs.*

Q: In the drop down for reasons Partially/Not Served, are we able to customize based on our agency's needs or is it automatically generated?

A: *This list is particular to the options that VAWA wants programs to choose from. You can add to this list if there is something your agency is interested in collecting, but it is important to note that just because you add it in that does not mean it will automatically tie to a report.*

Q: The Partially/Not Served box says to report the served status once per fiscal year. When should we do this?

A: *You should continue to report this in the current way you are reporting it now.*

Q: If a survivor has been ordered to take BIPP but she is also receiving victim services at an agency, how would we enter that into Osnum-Texas?

A: *If this situation arises, it will be important to keep the files separate. You will want to collect the BIPP services and client services separately.*

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Victimization & Service Screens

Q: What if the incident took place outside of Texas?

A: *There is an out of state and out of country option in the county drop down box that you can select.*

Q: If you enter a service that is before the intake date will the system notify you?

A: *The system will not let you enter a service that occurs before the intake date.*

Q: What does the residential check box on the service screen do?

A: *Each time you enter a service for a client, you will check this box if they are also a residential client when they receive the service. **This is critical for calculating HHSC service and shelter days.***

Q: If a client lives in County A but receives services from our office located in County B, do we list the services in County A (where they live) or County B (where our office is located)?

A: *For the County drop down box on the service screen, you will choose the county where you provided the service.*

Q: Do we have to enter a time the service was provided?

A: *This is optional and is there to assist you with your record keeping.*

Q: Can you record multiple services that occurred on the same day? For example, two telephone calls or two case management services?

A: *Yes. This can be done in the “Services” tab from the main client screen, or in the “Services Worksheet.” In the “Services” tab, click “New” to create a new service. In the “Services Worksheet,” click on the top row to begin entering a service. You will need to select the correct client in the services worksheet to enter multiple services. Additionally, you may use the “copy” button to make an identical copy of a service you already entered.*

Q: Is it okay to document each service provided as a core service, resulting in multiple core services?

A: *Each service you provide a client will result in a core service, and you should record it as you are currently recording services you provide to a client.*

Q: ITS uses units rather than time for some services. How should I enter services in units?

A: *Continue to collect data as you are currently doing, and enter the duration that the service was provided. On the back end of the system, it will pull what service is a unit and what unit is related to time.*

Q: Can we input multiple services for the same staff member, without re-entering that staff member’s name?

A: *If you use the copy button, the staff field will be populated from the record that you are copying.*

Q: On the services tab, will it show all the services that the client has received from all staff or just one individual staff?

A: *It will show you all the services they have received, as well as which staff member provided the service.*

Q: If we only are utilizing this system for HHSC, can we hide the other funding sources?

A: *Yes, your agency can decide to disable the other sources. Your support hours can go towards customizing the database to this level if needed.*

Q: How do you delete a service?

A: *This is a feature determined by the permission level your account has. You can determine who can delete services in the permission levels when you are setting up staff.*

Q: When I go back to edit a service entry, I cannot change the staff name. How can I change the name if the wrong staff member was selected?

A: *This may happen if your user role does not allow you to edit services that have already been entered. Switch to a user role with more permissions to edit these services.*

Q: Will each organization have to enter the services as per each of our grants? Will we do this prior to live date or as we go?

A: *The system comes to you with certain grants already built in: CJD VAWA, CJD VOCA, CJD SASP, HHSC, OVAG, SAPCS State, SAPCS Federal, ESG, and HUD APR. For grants specific to your agency, you can add those in or use your support hours to have those built in.*

Q: Are we able to batch services and case notes for group session?

A: *Yes, as long as a client’s name will not be a part of another’s client file.*

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Shelter/Stays

Q: If a client is moving from emergency shelter to transitional housing, will the start date for the transitional

housing stay need to be the same date as the end date of the emergency stay?

A: *The transitional housing stay date will be the end date of the emergency stay.*

Q: Can we document transitional housing only in the Stays section and not create an Emergency Shelter section?

A: *Yes, a client can come in and have their Stay record created to reflect just a Transitional Housing stay. They do not have to have an Emergency Shelter stay before they go to Transitional Housing.*

Q: When a client is exited from shelter, is that recorded as a service or is there a different screen for exits?

A: *When a client exits shelter, you will record that as a service if it is applicable to the funder you are utilizing. You may also record this in the Shelter/Stays tab in the Stays box. There is an option for a Program Exit Date and Time.*

Q: How can we track clients who transfer from non-residential to residential and vice versa?

A: *For an individual client, you designate each service they receive as residential or not. To see a list of services that a client has received, head to the "Services" tab. To see a list of residential services offered at your organization within a time period. This can be viewed from the grid view of the Services tab. You can use the filter icon on the Residential column to show Checked records and then by selecting the desired date range on the date picked when filtering for the Start On column.*

Q: If a client exits shelter and then becomes a non-residential client how would you transfer that client from shelter to non-residential?

A: *On the services screen, there is a residential check box. Each time they receive a service, you will check that if they are a residential. If not, then do not check it. The default is a non-residential client. Additionally, you would need to exit this client from shelter in the Stays tab.*

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Hotline Module

Q: Is there a way to transfer a hotline caller's information to the main client screen?

A: *Currently the system does not work in this way. The client needs to already be set up in the system first.*

Q: How does the Related Crisis Hotline tab on the primary client screen work?

A: *On the Hotline Module screen, there is a field called Associated Client. From here, you would pick an existing client in the system. This would then tie it to that client's main screen.*

Q: Can the Hotline Call Type list be edited and added to?

A: *Yes, you can add to this list. Be careful about editing existing items in drop down boxes- many of those items are there due to a funder requirement.*

Q: Is it required to enter all calls that come into the agency, or just the emergency hotline calls?

A: *Continue to record calls as you are currently doing. This module provides you with the ability to collect and report on your hotline calls, if you choose to utilize it.*

Q: We track specific demographic information on our hotline for United Way reports. How can we make sure we capture this information?

A: *You can customize the hotline module to meet your needs and you can always utilize your support hours to have these data fields built in.*

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Volunteer Module

Q: When entering volunteer time by individual volunteers, will we be able to pull a monthly report showing all the volunteer time tallied by each worker?

A: *Yes, this report will be available in the system.*

Q: Can we enter the number of individuals who provided volunteer hours in a bulk entry?

A: *Yes, we have included the functionality of adding individual volunteers as a bulk entry and being able to pull a report from that. For instance, if you have a volunteer that comes in every week for 20 hours and works at the thrift store, you will be able to enter this for the month in one entry instead of four different entries.*

Q: Is there a section where we can collect on the type of volunteer service? We would be utilizing this for in-kind match.

A: *Yes, there is a drop down with many different options and you can add to this list as your agency sees fit.*

Q: When selecting the volunteer type, can we select more than one type?

A: *You will need to select just one volunteer type per entry.*

Q: If some volunteer hours are entered as bulk and other volunteer hours are entered as individual, will reports pull the combined totals?

A: *There will be two separate reports- one will pull the individual volunteer hours and the other will pull bulk entry volunteer hours.*

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Customizing Osnium-Texas

Q: Do we have the ability to make other fields in the system mandatory?

A: *Yes, you may make other fields mandatory and your Administrator has the capacity to do this.*

Q: Can we add additional cities and states to the drop down options in the address section on the client screen?

A: *Yes, you can add to the lists by clicking on the new button. We have added each program's main city, so there might be some missing that you would need to add on your own.*

Q: If a staff member adds to a list or drop down, will that item appear to all users? Would the item need to be added by an Administrator?

A: *Yes, it should show for all users and usually is done by the Administrator. Generally, the Staff (limited) role cannot add to drop downs.*

Q: What if we move a field to another area of the system, will it still pull an accurate report(s)?

A: *Yes, but you can move a field within that area only. For example, one cannot move Gender from the*

Demographics box on the main client screen to another module but you can move it elsewhere on the main client screen.

Q: Is Administrator the only one who can use reset layout?

A: *Yes, only the Administrator can reset the layout. The only thing regular users can do is to add or remove items from grids, which only affects that user.*

Q: Is there a warning before you choose the reset layout option?

A: *Yes, there is a prompt that says, "You are about to reset your layout customizations. Do you want to proceed?" If you accidentally click yes, you can fix that by going to the Edit Model button under Tools. Then, go to Import Model File and import the last back up you have the layout. They are saved as .osm files. Log out and back into the system, and it should be the version that you last saved prior to resetting it.*

Q: Will our database have a backup file for the Texas layout?

A: *Yes, and so will Osnum and TCFV.*

Q: Once an Administrator has made changes to the layout and screens, how do changes get pushed out to all staff?

A: *The Administrator will need to go into Tools, Edit Model, and then choose Distribute Model File.*

Q: Can we specify which staff we want to push the changes to? For instance, Shelter staff may not need the same layout as the Legal staff.

A: *Yes, this can be done by staff role or by specific users. The developer cautions to be careful when doing this, even though the system does support it because it can be difficult to manage. A suggestion for the Administrator is to create for themselves staff roles for each type of model they are pushing out so they can see exactly what the layout looks like for that role or staff member. However, the ideal way for staff to see only certain things is by setting the permission levels rather than creating multiple layouts, but it is up to each agency to determine what works for them.*

Q: How would having multiple different models effect reporting, if at all?

A: *It does not affect reporting and only impacts the layout.*

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Grids & Filtering

Q: How do you search for a previous client?

A: *On the Startup View, there is a Find box you can utilize for this purpose. You can also set up filters from the Startup View.*

Q: Can information typed in customized grids be used for reports?

A: *The customized fields will not show up on the funder reports built into the system but are available otherwise in generic reports.*

Q: Are the columns permanently deleted or just removed for that current filter?

A: *When you remove a column for a particular filter, you are just removing it for that filter. You can go back to column chooser and add it back in.*

Q: Can we add a grid to a new tab?

A: *It is possible, and you would need to find a grid that already exists in the software that is not being utilized. You can then re-purpose that grid for your needs.*

Q: On the default tabs can you change the order of data entry?

A: *Yes, you can move items around by dragging them from one spot to another.*

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Surveys

Q: How can I create a survey?

A: *After you click on the Survey icon (which is in the Other folder) from the upper left hand tab on Startup View screen, you will click on New and Survey. A new screen will pop up and you will then click on New which is towards the bottom right of this new screen. Click on Field Set, and from there you can build your survey.*

Q: Can we print a blank survey to hand out to a client to complete anonymously for a more confidential collection of data?

A: *Yes, it is possible. Most clients usually have surveys in Word or PDF format for this purpose. Printing a survey in WS is designed to show results of a completed survey, not as a blank form for a client to complete.*

Q: Can a survey be required to fill out for all clients?

A: *It is not a good idea to link surveys to clients due to client confidentiality and the need for some surveys to be anonymous. Also, the system itself does not have the functionality to make it a requirement to tie a survey to a client file.*

Q: Is there a survey to find all clients with new sexual assault victimizations and new sexual assault clients within the past month? Or would this information be gathered from running a report?

A: *You would run a report to gather this type of information.*

Q: Can you create a report for a survey?

A: *Yes, you can, but the reporting is more challenging. Osnium can assist with custom reporting if you would like to utilize your support hours. The developer suggested that if multiple agencies need a particular survey and report for those handful of agencies to get together and create one in order to reduce the amount of support hours that may need to be used.*

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General Questions

Q: Will I still need to enter data into ITS?

A: *No, you will not need to enter into ITS. You will need to upload from ITS to FVNet.*

Q: Towards the top of the screen in the ribbon, there is a button called Validate. What does this do?

A: *This checks that you have completed the required fields. When you click on Validate, it will let you know if you did not enter something that you needed. It works the same as the Save button.*

Q: How do we enter clients with the same name but different birthdays?

A: *When you attempt to enter a new client with the same name of an existing client, the system will warn you with a pop-up that the name already exists. You will then decide whether it is the same client, or if you need to create a new record for a new person.*

Q: If you find that you have a duplicated record, can you merge it instead of deleting it?

A: *There is not a merge functionality in the system. You would need to review the records to determine which one you would like to keep.*

Q: Does the software have the capability to track program information outside of victim and offender based services? For example, if we provide parenting classes for the community could we track those individuals on a more basic level?

A: *Osnium-Texas does have a section designated for community education and presentations, but this is not intended to track individual participants. This section was created for reporting requirements only, and gathers data related to the length of the presentation, staff involved, the topic of the presentation, number of attendees, etc.*

Q: Will there be new sample forms for us to use to follow the new software?

A: *We are currently working on updating TCFV's sample intake form for agencies to utilize.*

Q: Is there a set of paperwork that corresponds with Osnium-Texas?

A: *Osnium has a [documentation link](#) that has a manual for information on the system, and TCFV will be creating a basic users guide.*

Q: Is there a print button on each screen and tab?

A: *No. You can print a grid-view by either selecting the Print preview button on the column header or by right-clicking or selecting the Print option in the context menu. For other views where there is a display report available, you can select the Show Report icon on the ribbon menu and selecting the desired report and selecting the print icon once the report is displayed on the screen.*

Q: Is there a way to print out a client's profile including all services that the client has received once the month has been closed out?

A: *This will be included in the Client Details Report.*

Q: Is there a way to print the entire record in response to a subpoena? Would this include case notes from the case notes tab?

A: *The Client Detail display report will display all records associated with the client, including the case notes.*

Q: Are uploaded documents saved in the system itself, or just linked to the file in an area on our computer?

A: *Documents that you may upload into the system will be saved in the system itself and will be embedded in the database.*

Q: What does the system mean for record keeping since we do not maintain client records after 3 years and 90 days? Does Osnium-Texas keep client records indefinitely?

A: *It will be important to match your internal policies to whatever action you decide to take for your record keeping, and Osnium-Texas does not have to keep your records indefinitely. If you are choosing to use this system for retention of your client records, HHSC requires for you to maintain your records for 3 years and 90*

days. Other funder requirements may differ.

Q: Can staff track goals progression in this database?

A: *You can utilize the system to track goals, and you may want to use the Case Notes tab for this purpose.*

Q: Where can outcomes be tracked?

A: *You could utilize the Case Notes tab to track outcomes.*

Q: If a user gets locked out in the middle of an entry, will that information be lost?

A: *No, the information will not be lost. All it is doing is locking your computer.*

Q: May two users enter or edit the same data on the same client at the same time?

A: *No, and the system will produce an error message for the second person trying to edit the screen, and the first person's changes will be saved. It is important to note that if you are on the service screen, for example, and two staff members are adding in different services at the same time that is allowable. If more than one person is in the same client record adding or changing different items that should be fine.*

Q: Does the cancel feature in the system work the same way undo does in a Word, for example?

A: *Cancel will undo any changes prior to the last save you made, so it is a little different from the typical undo that changes a single change whereas the cancel button will go back to the last save.*

Q: We noticed that there is a max stays option. What is that for?

A: *That would be if you wanted to enter the max stay at your agency, but we have chosen not to enable it as a state.*

Q: Is there a "save, but incomplete" feature?

A: *There is not such feature, but there is a save and close button you can use on the top of each screen.*

Q: For those programs that want to use Osnum-Texas to track all of their BIPP will that be done a one-on-one basis with programs?

A: *Currently we do not have a separate BIPP module.*

Q: Is there a way to lock a child's record once they turn 18 so new services cannot be entered for them as a child?

A: *The system currently does not have a time-sensitive functionality to restrict based on age.*

Q: For records that are older than we are required to keep them, such as someone that was in shelter 10 years ago and we would no longer have the paper record, can the data be removed from our database?

A: *We do have the capability to purge records but is feature that falls outside the scope of this project. Please contact support for assistance.*

Q: Is there a way to make a client inactive after a certain time frame so we can keep track of our current clients as opposed to clients who left our program 6 months ago?

A: *It is not necessary to make a client inactive since queries are tied to the date a service is provided.*

Q: The search bar keeps disappearing from the start up view. How do you get it back?

A: *If you right click on one of the column headings, e.g. First name and select Show Find Panel it should re-appear.*

Q: If the offender is unknown or survivor doesn't want to disclose the offender's information, what should we do?

A: *Enter any information you have on the offender in the "Victimization" tab. Be sure to check the box labeled "offender unknown."*

Q: If you pick something in a box you meant to leave open how do you go back to having no entry?

A: *Please select CLEAR*

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