Last updated 6/2020 by BMB

OSNIUM-TEXAS USER GUIDE

TEXAS COUNCIL ON FAMILY VIOLENCE

This guide will help you get started using Osnium-Texas and is designed to assist you with navigating through the system. This is meant to serve as a tool to help you utilize Osnium-Texas, so please make sure to further review instructions regarding accurate data collection provided by your funder. *For any conflict between TCFV created documents and funder-issued guidance, please refer to the funder guidance.* TCFV has also created many training webisodes to learn the system. They all can be accessed by registering on Creating Safer Spaces (password: Survivor1).

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Welcome to Osnium-Texas

This system is a reporting tool designed to assist in collecting and reporting on pertinent client data in an aggregated format. This system contains items to meet several funders' requirements including the following Texas-based grants:

- Office of the Governor, Criminal Justice Division (CJD)
    - Victims of Crime Act (VOCA)
    - Violence Against Women Act (VAWA)
    - Sexual Assault Services Program (SASP)
- Health and Human Services Commission Family Violence Program (HHSC FVP)
    - Monthly FVNet Data Upload
- U.S. Department of Housing & Urban Development (HUD)
    - Annual Performance Report (APR)
- Texas Department of Housing and Community Affairs (TDHCA)
    - Emergency Solutions Grants Program (ESG)
- Office of the Attorney General (OAG)
    - Sexual Assault Prevention and Crisis Services-State (SAPCS-State)
    - Sexual Assault Prevention and Crisis Services-Federal (SAPCS-Federal)
    - Other Victims Assistance Grant (OVAG)

The fields needed to report data in the aggregate form for all these funders are integrated into this system. While it is possible to modify the information fields within the system to remove components, be aware that any changes that remove fields may affect your reporting capabilities.

You may choose to customize this system for your agency's needs and develop individual reports as you see fit and each participating agency has eight support hours with Osnium, to be used annually. If you choose to customize the system, we recommend you keep track of those updates in a spreadsheet as a major update to the system in the future could affect those additions.

Osnium-Texas has several sections designed to collect different kinds of data. Click on the navigation button in the upper left-hand corner of your screen to see the different sections of the system. This guide will help you to navigate each area, but please look to the webisodes, other TCFV created reporting guides, and Osnium's website for additional information. These can all be found on our Creating Safer Spaces page.

What Kind of Information Can Be Entered in to Osnium-Texas?

Osnium may be used to collect information that is necessary for reporting purposes as well as some case management functions. There are additional case management components available within Osnium Texas that are not currently enabled, but each agency can utilize their Osnium support hours to implement them as needed. Please note that while Osnium Texas may change the way in which you enter information, each agency will still want to report client information and data to grants according to your internal policies and the guidance provided by each applicable funder.

Osnium Texas is a localized client management software and as such the data within the system is governed by each agency's data security policies. We strongly recommend having stringent data security policies in place for the maintenance of the system due to the sensitive confidential information contained within each database. Since it is a local database, access is available only to your agency and those with whom you grant access. We also encourage all agencies utilizing Osnium to frequently back-up your data internally as there is no centralized back-up done by Osnium.

While this manual is not a guide to confidentiality requirements, we urge each user look to your applicable regulations and keep those in mind while navigating Osnium Texas. Most programs using Osnium Texas have state or federal regulations in place that govern the confidentiality of client information. For example, the confidentiality of personally identifying information of a survivor of domestic violence or sexual assault is to be protected according to the requirements outlined in the Violence Against Women Act (VAWA) and the Family Violence Prevention and Services Act (FVPSA).

Quick Tip:

Remember that the survivor's consent is always needed when gathering information or uploading documents into the system.

Should you have questions about confidentiality guidelines or want additional information please feel free to contact the Texas Council on Family Violence (TCFV) at datatx@tcfv.org.

Setting Up Users & Roles

Each person who uses Osnium-Texas has their own username and password. Please refer to the step-by-step instructions in this section of Osnium's documentation link to set up your staff members with their own Username and Password.

The different roles are: Administrator, Almost Administrator, Staff (limited – All Case Notes), Staff (limited – Own Case Notes), Hotline, Volunteer No Access, and Volunteer Read Only Access.

It is recommended you have at least one person set up as the Administrator at your agency. They will have the most control over the system and have no restrictions on editing the system. The Almost Administrator is set up as a management role and has the capability to reset staff passwords and set up new staff, but they cannot change the layout of the software.

Quick Tip:

If you are the Administrator and will also be entering data into the system, it is suggested that you create two accounts- one as Staff (limited) for entering data only and one just as an Administrator. This will limit accidentally deleting or changing something in the system.

You will likely set up most of your staff as Staff (limited -- Own Case Notes) or Staff (limited – All Case Notes) if you want them to have access to the system to create and enter client data. With the former role, the staff member will only be able to read their own case notes. With the latter role, the staff member will be able to read all case notes entered into the system. Volunteer No Access means they have a staff account but cannot do anything with the system; Volunteer Read Only Access means they can only view information in the system but cannot change anything.

Each user role described above has different abilities within the system: read, write, create, delete, and navigate. Each of these abilities is defined below:

- 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. When the Navigate operation is not granted, the corresponding navigation item is unavailable.

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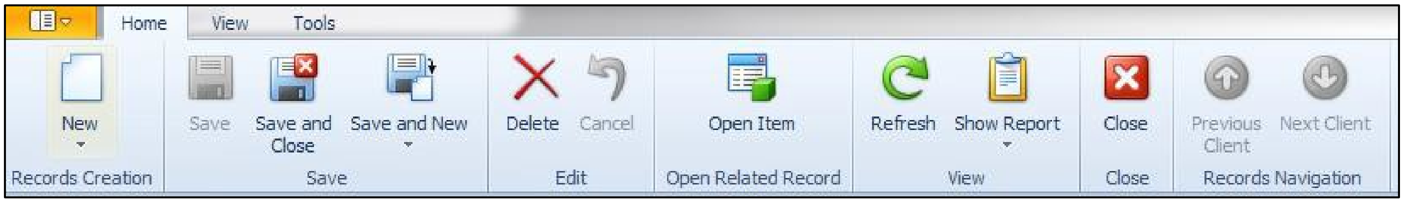
Basic Navigation

Throughout these different sections, there are common navigation features that are designed to make the software consistent and easier to use. We have compiled a list of navigation tips that apply to most sections of the software and should help you feel oriented within the system. It is designed to look and feel similar to Microsoft Office products. At the top of every screen is a ribbon of different commands that allow you to save your work, close the file you're working on, or navigate to a new file. This ribbon looks slightly different depending on the section you are working in. Above the ribbon, on the left side of the screen, is a navigation button that allows you to navigate to the different sections of the system:



The Navigation Ribbon. This ribbon may look different, depending on what section of the system you are in.

In general, click "New" on the navigation ribbon, or within individual boxes on the screen, to enter new records. Sometimes, instead of "New," the individual record you are creating will have a button that says "Add." The "Add" button generally allows you create a new record, or link an existing record to the record you are working on (for example, to link together an existing client and their child's record).

Additionally, you will enter data using several different types of information fields. Write-in fields allow you to manually type information into the system, and this is mostly used for entering case notes or names. Drop down fields allow you to choose from a list of options—for example, choosing a race or gender identity. After clicking on some drop down fields, you may have to click "Go" or "Search" in order to see the entire list of options to choose from. In some drop down fields, "Other" may be an option. If you choose this option, there may be a write-in field below labeled "Specify Other" (or something similar). This box allows you write in additional details, and should only be completed if you choose "other" in the drop down field above. Individual boxes within sections can be resized by clicking the line or dots in between boxes, or dots in the corner of a box, and dragging to make the box larger or smaller.

There is also a "Copy" button for services that allows you to replicate a record and then make a change to the service, staff member, date, etc. This will allow each agency to enter records in an expedited manner. Please note that when you copy a record it will be important to change all applicable pieces so that you do not end up with multiple copies of the same exact service.

Finally, it is recommended that you **save your work often** by clicking "Save" in the navigation ribbon, just like you would in Microsoft Word. While the system will not log you off after a period of time, power outages and computer problems may occur and data that is not saved can be lost.

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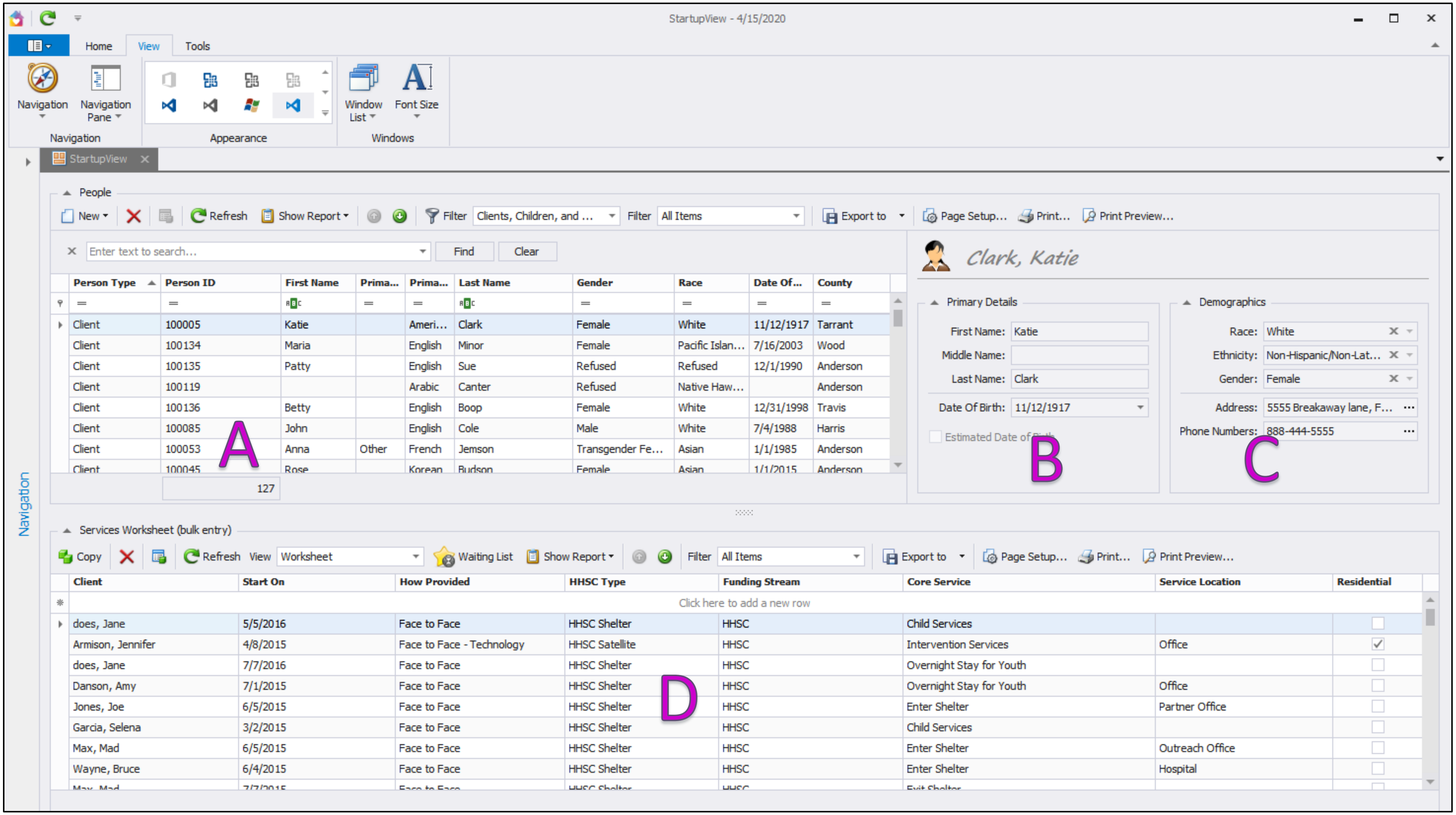
Quick Tip

While most of the drop-down fields are customizable, each drop down field currently contains only those options that are required by funders. Adding or removing options may affect the data that the system can report to funders. Exercise caution in customizing these options.

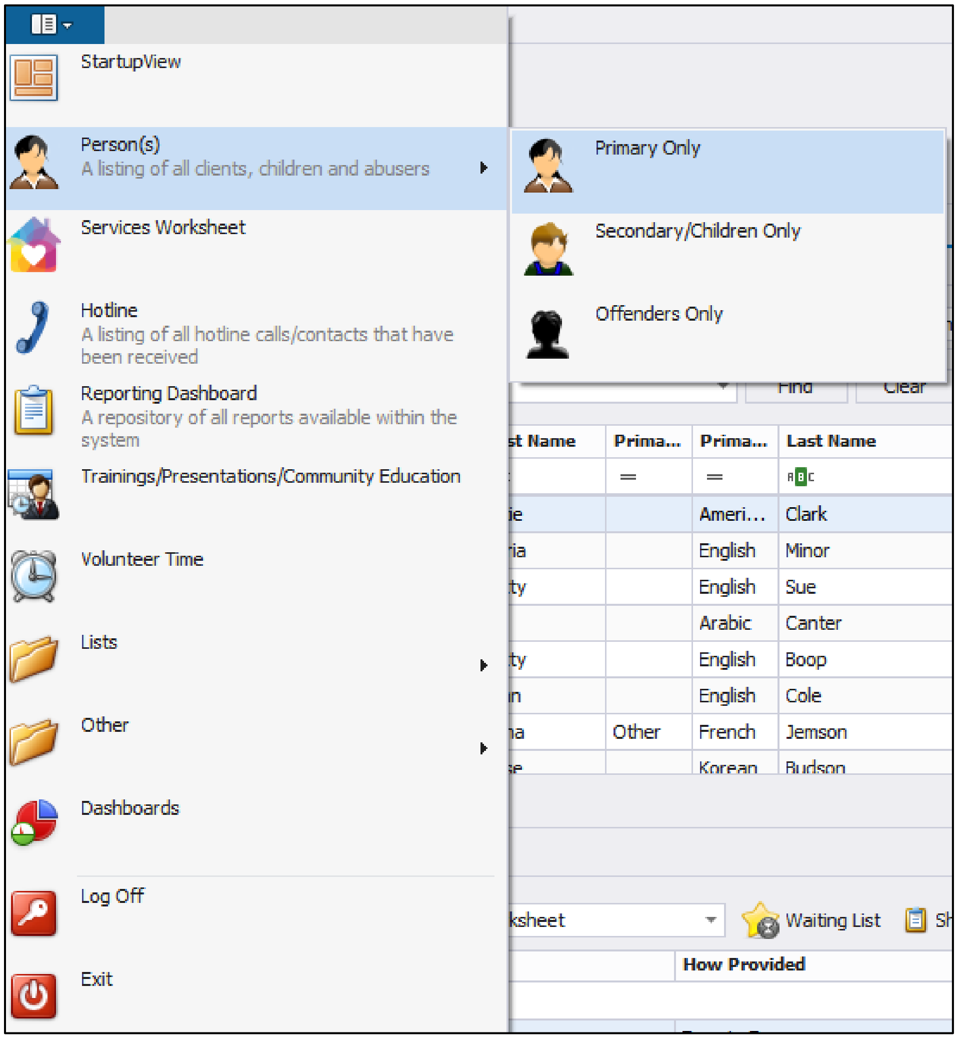
Startup Screen

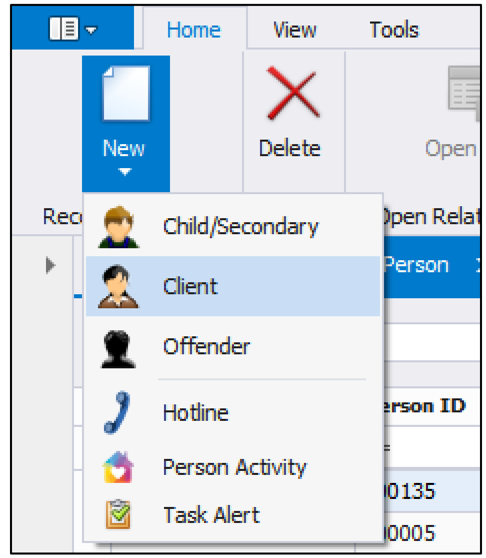
Upon opening Osnium-Texas, you will see this screen. The top half of the screen, the box on the far left (A), contains a list of all clients and offenders that have been entered in the system (those listed here are not real clients). Boxes (B) and (C) provide details of the client you have highlighted in box (A). The bottom half of the screen (D) allows you to quickly enter services for all clients; this is discussed later under the Services section.



Clicking on the tab in the upper left-hand corner of the screen (shown below) reveals different navigation options available.

Hovering over "Person(s)" allows you to create a new person record. Primary clients are usually survivors that have self-identified as being victimized and are seeking your services; Secondary clients are people associated with a Primary client (such as children); and Offenders are those the primary client state are perpetrators of violence. The other options in this navigation window ("Services Worksheet," "Hotline," "Report," etc.) will be discussed in detail further in this guide. Click on the person type you want to create, and then hit "New" in the upper left-hand corner on the next screen.





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Main Primary Client Screen

The next page shows the Primary Client Screen. The Primary Client record is organized using different tabs. The top half of the screen (shown below on the next page) contains demographic information that is collected by some funders, as well as Osnium client ID numbers, and ITS/Alice client ID numbers.

This screen also contains the “TANF/SSBG Eligible” and “TANF/SSBG Date Tested” fields, which need to be updated either at entry for services or at the beginning of each fiscal year for current clients, for programs with HHSC Residential and Non-Residential Contract. This should be done even if this field was updated right before the start of the fiscal year. The system will remind you to fill this section out if it is left blank, and it will also remind you to reassess your clients each year.

The lower half of the screen contains tabs that organize information based on victimization, services received, shelter stays, survivor employment and family information, related hotline calls, protective orders, case notes, and financial assistance.

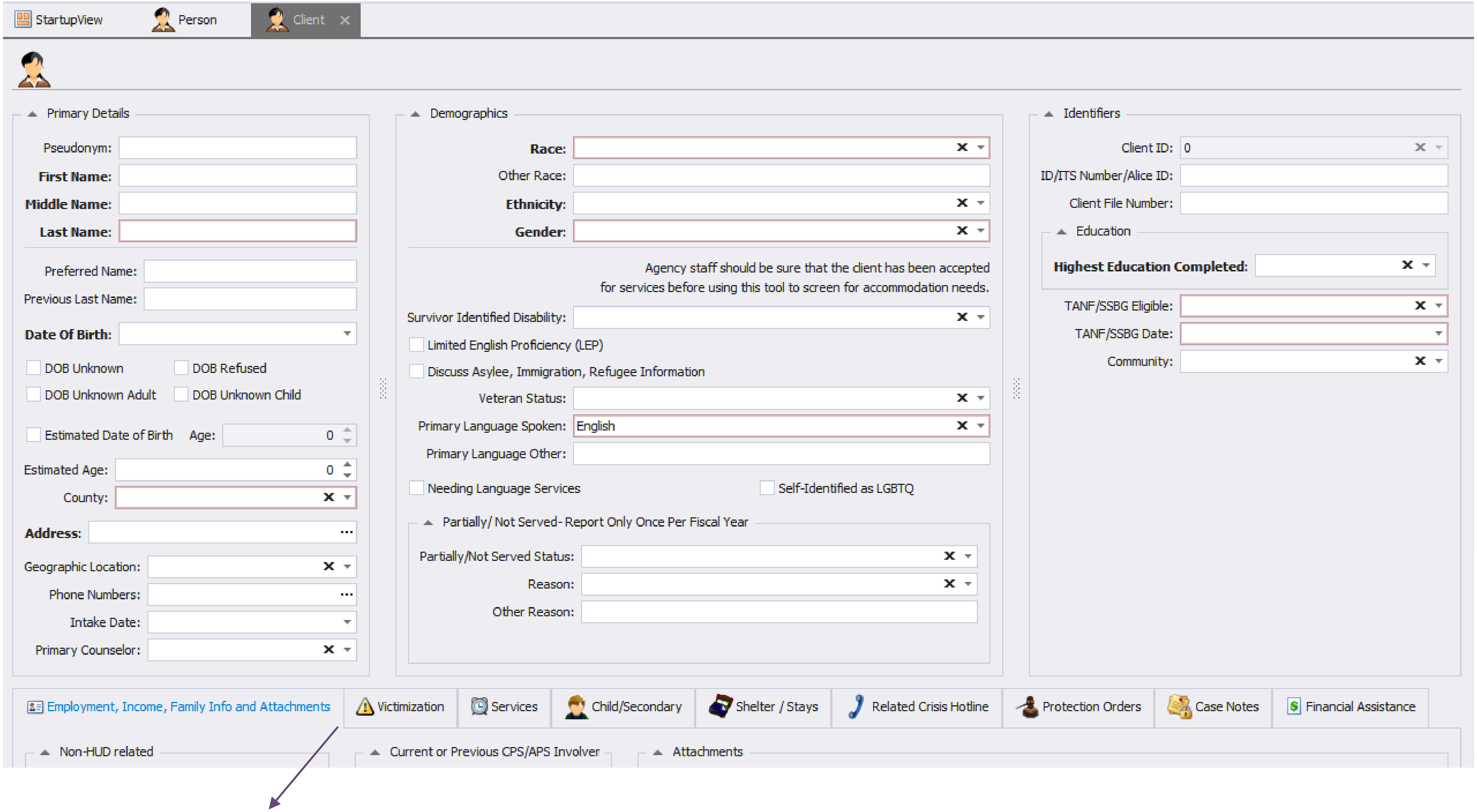
Each data field below is included on this screen because of the requirements of different funders. This means that it is important to fill out as many fields as you can. Fields that are bolded will auto populate into the Shelter/Stays tab, and we will address that tab later in this manual. This screen will also show up when you double click a client’s name from the previous screen. Navigate through the different sections of a client’s file from this screen. Additionally, the Child/Secondary client screen closely resembles this screen and operates in the same fashion.

The following pages will go into detail on what each of the tabs towards the bottom half of the screen represent.

Quick Tips

- Intake Date is the date on which you first completed an intake with the client. This date never changes—even if the client leaves the program and returns. An intake date field is also on the victimization screen and does change as needed.
- Age will not show up until you enter the date of birth (DOB) and hit “Save” at the top of the screen. It is good practice to hit “Save” periodically when entering your data.
- Fields with a red outline, (seen below around Last Name, Race, etc.) are required fields. Administrators can make fields required as needed.

Primary Client Screen



These tabs represent sections of the client’s file. Click each tab to navigate to that section. As a general rule, click “new” (seen on other tabs, such as “victimization”) within each tab to add a new entry.

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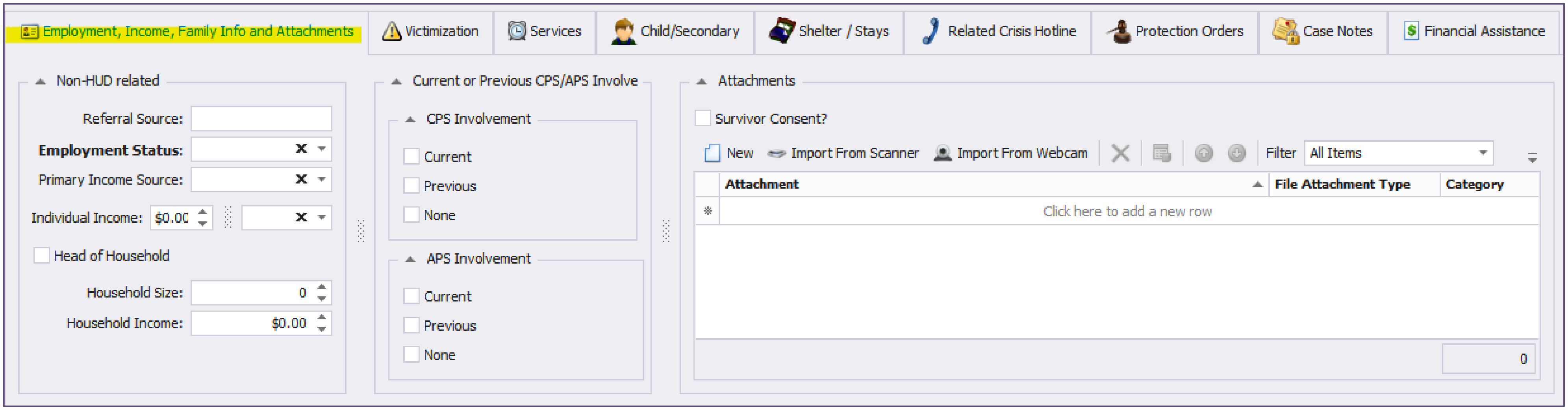
Employment, Income, Family Info and Attachments Tab

Go to the main client screen, and select the tab labeled “Employment, Income, Family Info and Attachments.” The box on the left labeled “Non-HUD Related” collects various information regarding employment status, income, and household size. “Current or Previous CPS/APS Involvement” is used to track whether or not the client is currently involved with CPS or APS, and is optional unless you are reporting for the Growing Safe Families grant. This is also the primary area for attachments for your client. Click on “New to upload a document from your computer.



Quick Tip

Always get consent from a survivor before uploading any documents or pictures.

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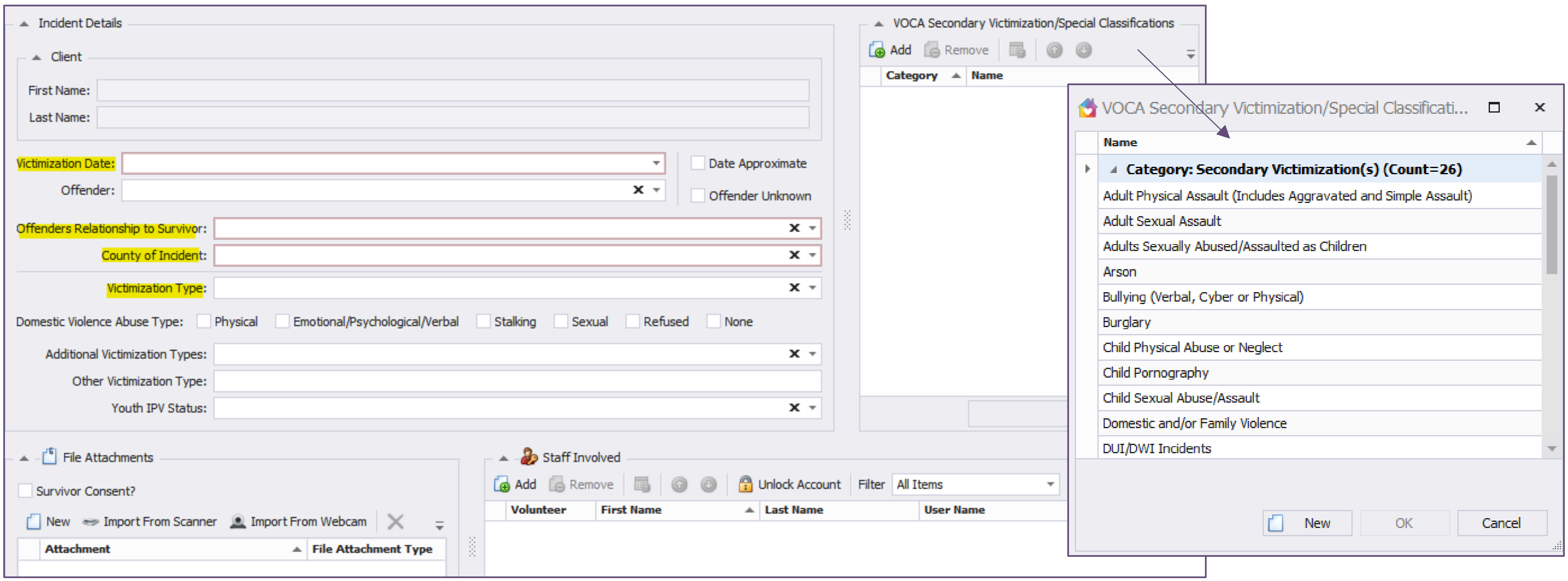
Victimization Tab

The victimization tab is used to record the incident that the survivor identifies as the reason that led them to seek services. This information is collected for reporting purposes. To add a new victimization, click “New” under the victimization tab on the primary client screen (shown on page nine).

The screen below shows the information required for a Victimization. The “Incident Details” box should always be completed along with the Victimization Type field. Fill out the other fields as applicable to your agency, such as additional victimizations if needed. This screen also allows you to upload documents related to the incident in the “File Attachments” box.

In the “VOCA Secondary Victimization/Special Classifications,” it is important to note that this section will only need to be completed if the client has identified as having a secondary victimization beyond the incident that the survivor identifies as the reason that led them to seek services or self-identifies as any of the special classifications. Users should select all the options that apply, so more than one option from each category can be selected if necessary.



To open this window, click “Add” under the box labeled “VOCA Secondary Victimization/Special Classifications.” The window may open to a full screen view—to reduce its size, click the reduce button next to the red X. Click the “+” next to each category to expand the options. In this screen shot, “Special Classification(s)” is expanded.

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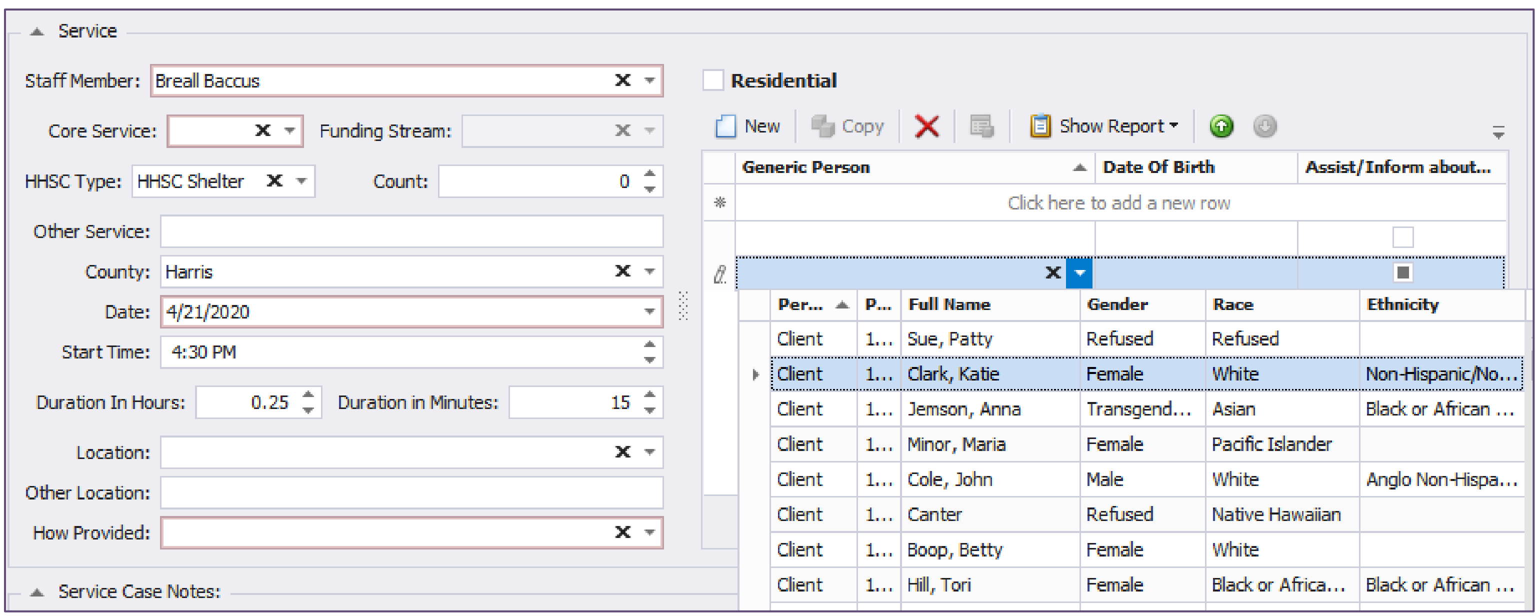
Services Tab:

This section is used to record data related to the services that individual clients receive. Please note that shelter stays are recorded in a separate section that must be completed for accurate accounting of shelter nights for HUD or ESG reporting. The only exception to this is for reporting shelter days to HHSC. To accurately count shelter days for HHSC, it will be important to enter both an HHSC Enter Shelter service and an HHSC Exit Shelter service. From the main client screen, click on the services tab, then click “New” to enter a new service. Make sure to fill out the applicable fields:

- Staff Member: Staff providing the service.
- Core Service: What service you choose will depend on your agency’s data reporting methodology and service definition provided by the funder. The “Other Service” write-in field is only filled out if you choose “Other” in the “Core Service” dropdown.
- County: What county the service is being provided to the client.
- Duration: Can be completed in minutes or in hours. You should choose the method that the funder has indicated, and the report will pull it as a different unit if applicable.
- Location: Location at which the service was provided. You should only fill out the “Other Location” write-in field if you choose “Other” for the “Location” dropdown.
  HHSC Type: This refers to your agency’s HHSC contract type. If you are not entering an HHSC service, then the HHSC Type selected does not matter.
- Residential: This checkbox refers to if the client is a residential or non-residential client. This checkbox is very important for reporting purposes for HHSC, as it is used to calculate service and shelter days for HHSC. If the service was provided to a client not residing in shelter, leave it unchecked.
- There is also a “Service Case Notes” box, which is not used for reporting purposes and can be used however your agency sees fit. For confidentiality purposes, it is recommended that you carefully consider the information entered into this box.

The window to the right of the services screen gives you the ability to enter multiple clients who received this same service, referred to as “batching”. Be sure to double check the information you are entering prior to saving because as soon as you save and close, all of the client services will be split and will need to be changed separately if corrections need to be made.



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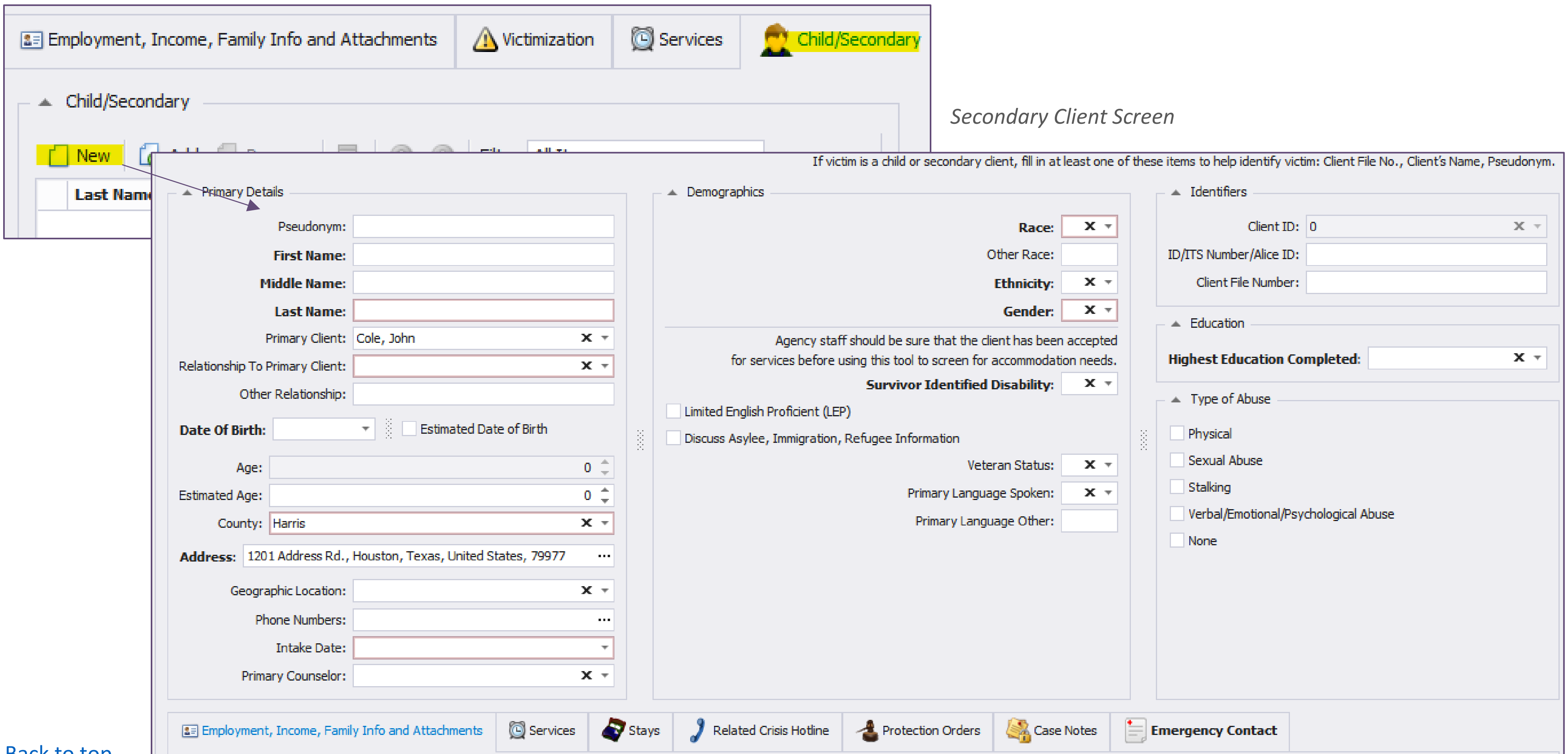
Child/Secondary Tab:

After saving the primary client you have created, you can use this tab to create child/secondary client. Click new (highlighted below) to create a child/secondary client.

The child/secondary client page is similar to the primary client page, but with less details needed. These fields and tabs work in the same way as the primary client page. Please note that the child/secondary client does not have a victimization tab. This is because funders generally attach the primary client's victimization to the secondary client, so it is not necessary to add the secondary client's victimization into the system. A screenshot of the child/secondary client screen is shown on the next page.



Secondary Client Screen

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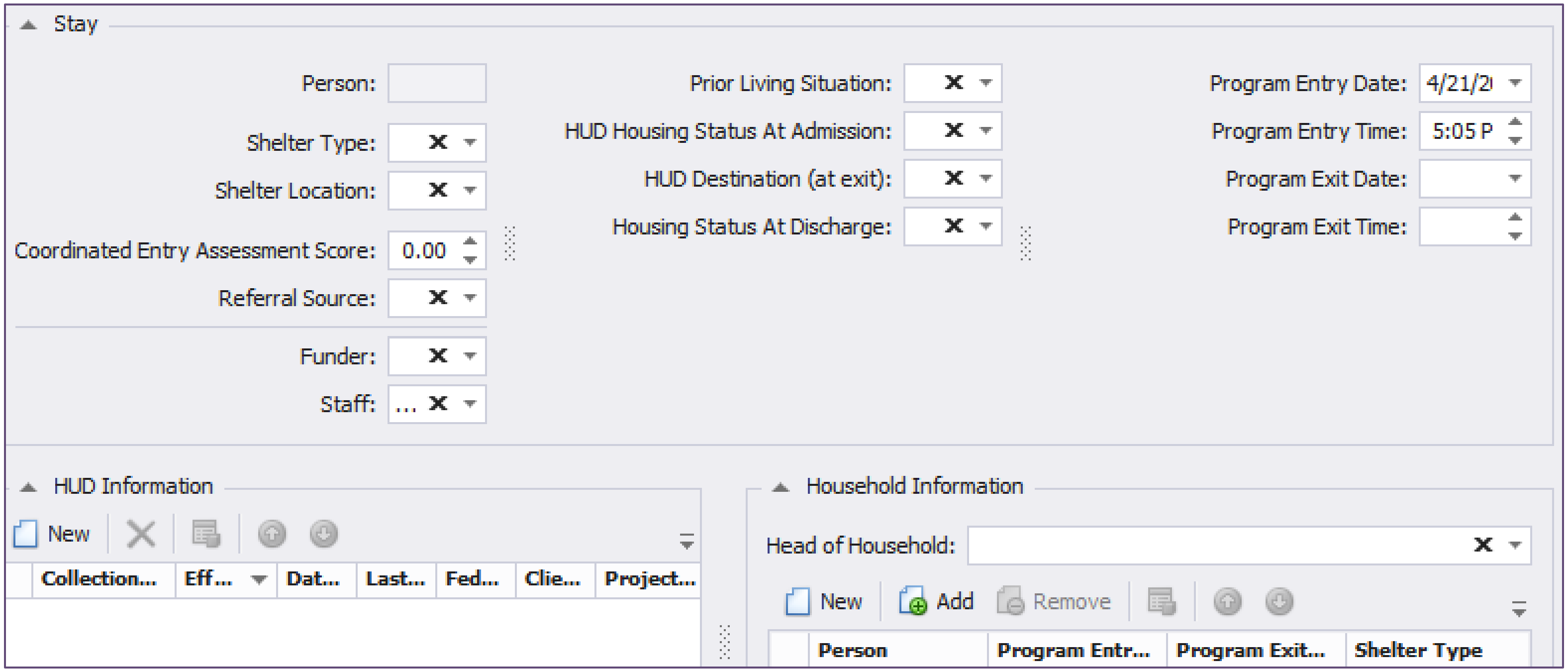
Shelter/Stays Tab:

To get to this screen, click the “Shelter/Stays” tab on the main client screen, then click “New.” This section contains information on a client’s shelter stay (if applicable). This tab is also where you collect information related to the HUD APR and ESG reports. To differentiate between your program’s different HUD, ESG, or other grants, you can add each individual grant to the “Funder” dropdown and select the particular grant that you want each stay to be reported under.

Choose the client for whom you are entering information in the “Person” field. Usually, this field will be pre-populated with the client for whom you are entering data. Choose the type of shelter provided in the “Shelter Type” dropdown. Fill out as many of the other fields as you can.



The bottom right box is Head of Household section. HUD requires that a Head of Household be designated for each family served. Usually, the Head of Household is the primary client. This tab also allows you to connect the primary client to secondary clients (including children or other relatives). To connect a primary client to a secondary client for HUD, click “Add” under “Household Members.” From here, you can select a secondary client.

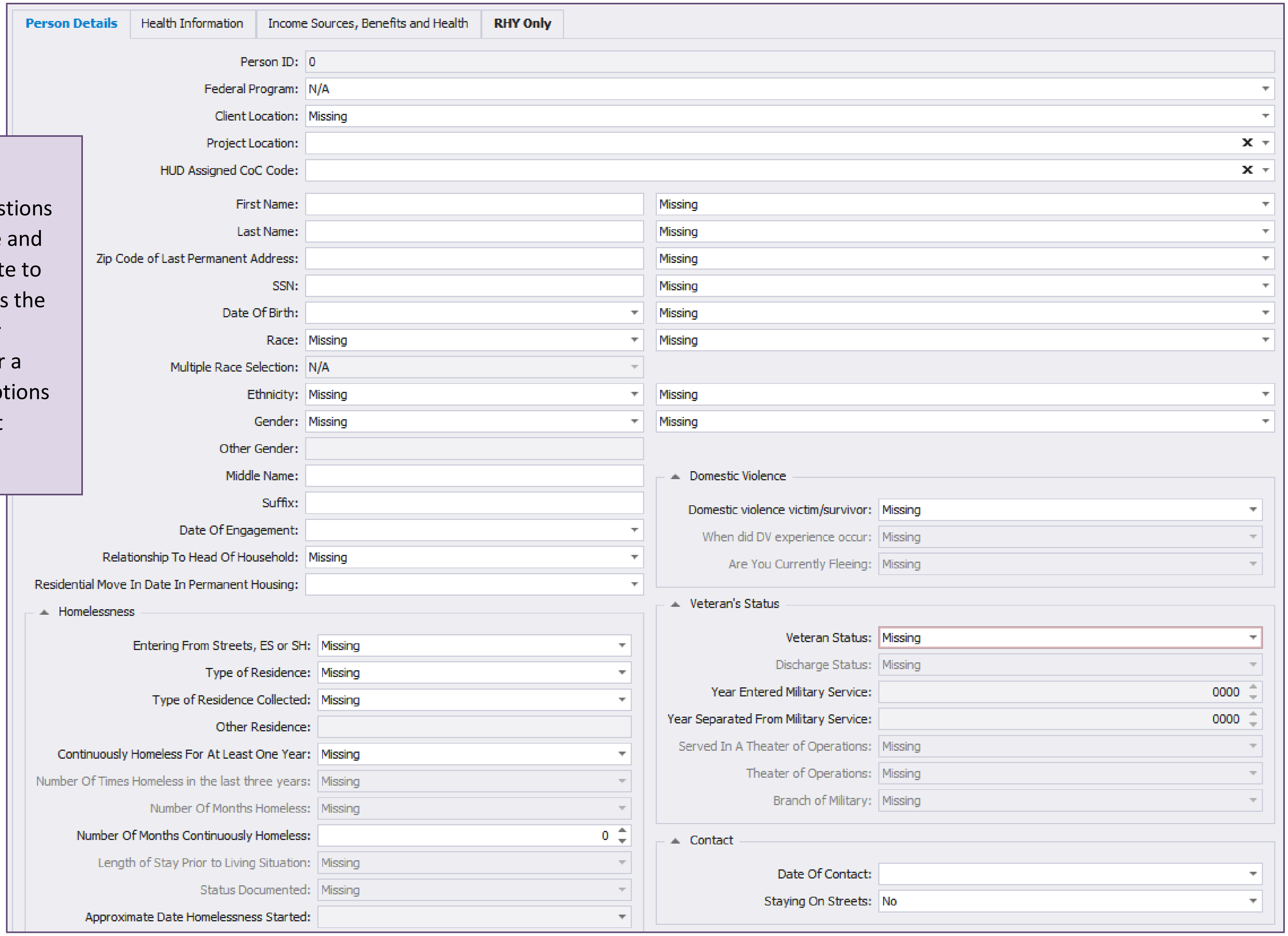
Quick Tips

- If your agency would like to utilize the Stays Report, all clients must have a stay entered into the stays tab. HHSC clients, they will have to have a Stays entry and an Enter Shelter Service to accurately be counted.
- If there is more than one category in a dropdown, double click each category within the dropdown to display available options.
- If secondary client profiles are created before entering stays, the stay will copy to the associated children when you save the stay.

If you must enter HUD information for an ESG or CoC grant, you can do that under "HUD Information", click "New." This will bring you to a screen that will allow you to enter the demographic information related to your client. Although this section asks a lot of the same information that other sections have already collected, HUD has some very specific questions and responses that are different than other funders so HUD fields have been separated. HUD requires this to be filled out at Project Entry, Project Update, or Project Exit. For more information on HUD data collection, please see our resources on Creating Safer Spaces and Osnium HUD webinars.

Quick Tip

- Some of the HUD questions are sensitive in nature and may not be appropriate to ask a survivor. If that is the case, or if the survivor chooses to not answer a question, there are options in the dropdowns that reflect these choices.



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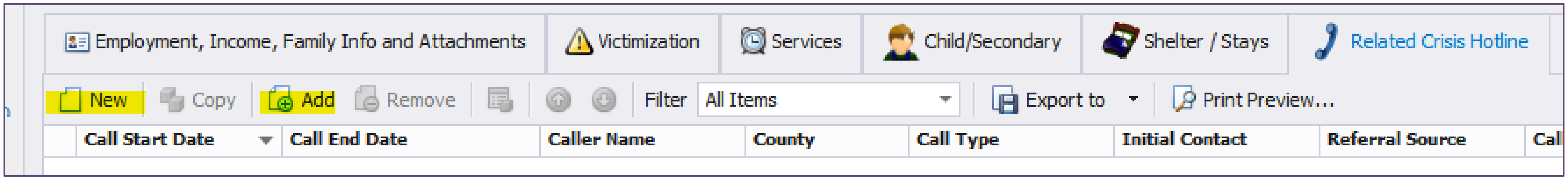
Related Crisis Hotline Tab

This tab allows you to link a hotline call to a client. If a client has called the hotline to access your services, you will be able to pull up that call record in this tab. Keep in mind that as some hotline calls are anonymous, you may not be able to link all hotline calls to a client. If the client does identify themselves to hotline staff, however, it can be useful to link their records to their calls. This is also an optional feature and is not related to any reports made to funders.

To link an existing hotline call record to the client, click “Add.” This will pull up a list of all the hotline call records in the system. Select the hotline call record you’d like to link, then select “Ok”. To create a new hotline call record for this client, click “New.” This will pull up a new hotline call record entry, where you can add any information about the call.

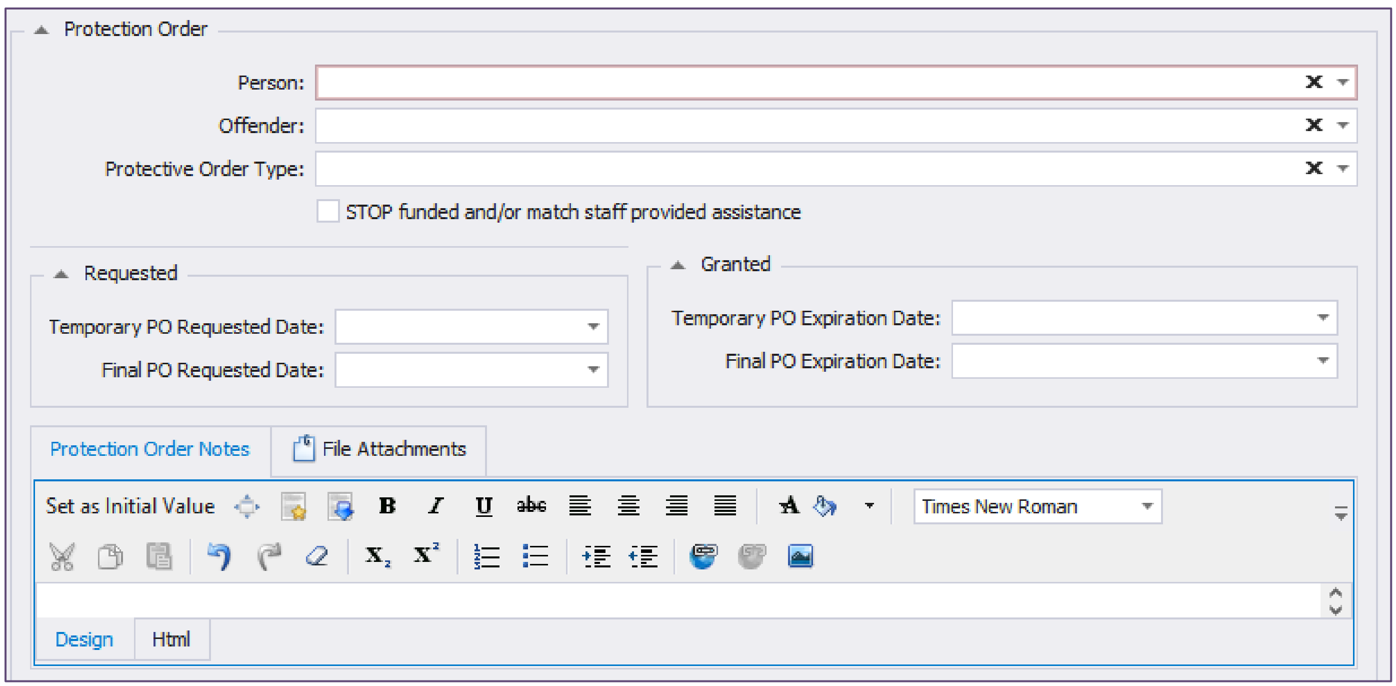


Protection Orders

This tab contains information related to the client’s protective order. It may be used to assist in keeping up-to-date with a survivor’s protective order (PO) status. To add a record of a PO click “New.” Enter the information about the PO then click “Save and Close” to return to the client’s file. You may also attach documents in this section. You are able to enter the Temporary PO expiration date and the Final PO expiration date. There is also a dropdown that lists the current types of PO’s in Texas.

Quick Tip

- Please be cautious and get consent from the survivor to upload any sensitive information to a case file.



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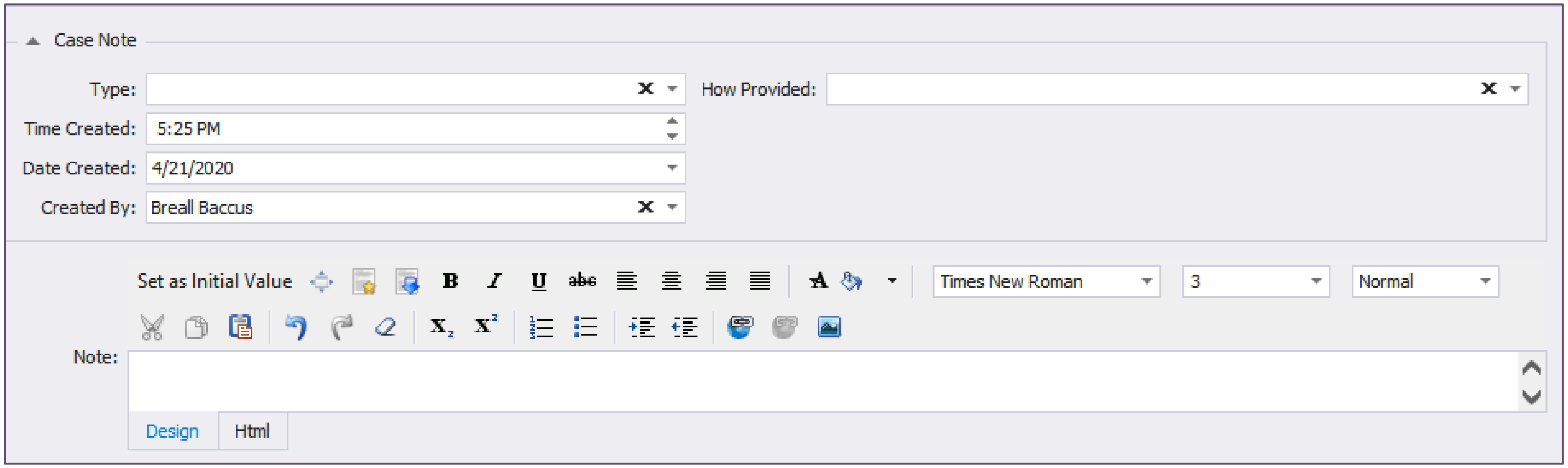
Case Notes Tab

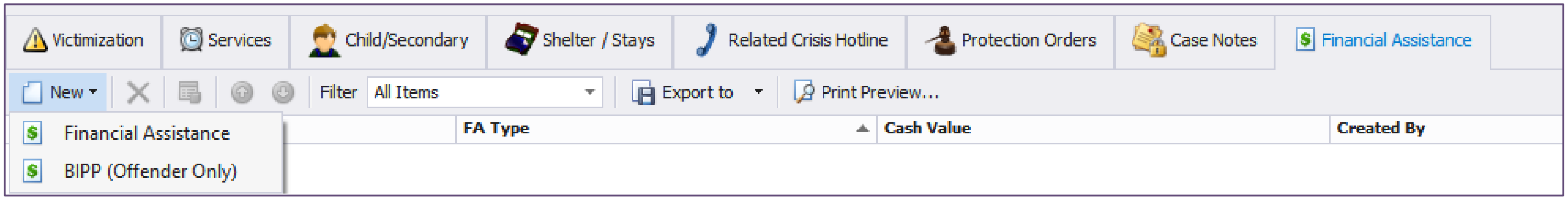
This area is not for reporting purposes and is for each agency to utilize in a way that they seem best. At TCFV, we have sample policies that can assist in determining your policies around record generation and maintenance. For information on our sample policies please visit [Creating Safer Spaces](#) (pw: Survivor1).

To enter new case notes, click "New." Currently, there are no pre-programmed responses for the fields labeled "Type" and "How Provided." Each program can customize these responses to meet their needs. Keep in mind that depending on the staff role you have designated, these case notes may be visible to other staff accessing the system. To prevent this from happening, make all of your staff use the Staff (limited – Own Case Notes) role.



Financial Assistance Tab

This area is used for ESG reporting, and can be utilized by each agency in the way that is best for them. Click on 'New," then click on "Financial Assistance." (The "BIPP" option is only applicable to the offender and comes into play on the Offender screen, to be discussed later.) To enter a new Financial Assistance record, click "New," then select "Financial Assistance." Choose the FA Type and the Cash Value, then "Save and Close."



This concludes all of the tabs in the Primary Client file. Many of the same tabs exist in the Child/Secondary Client file and operate in the same way.

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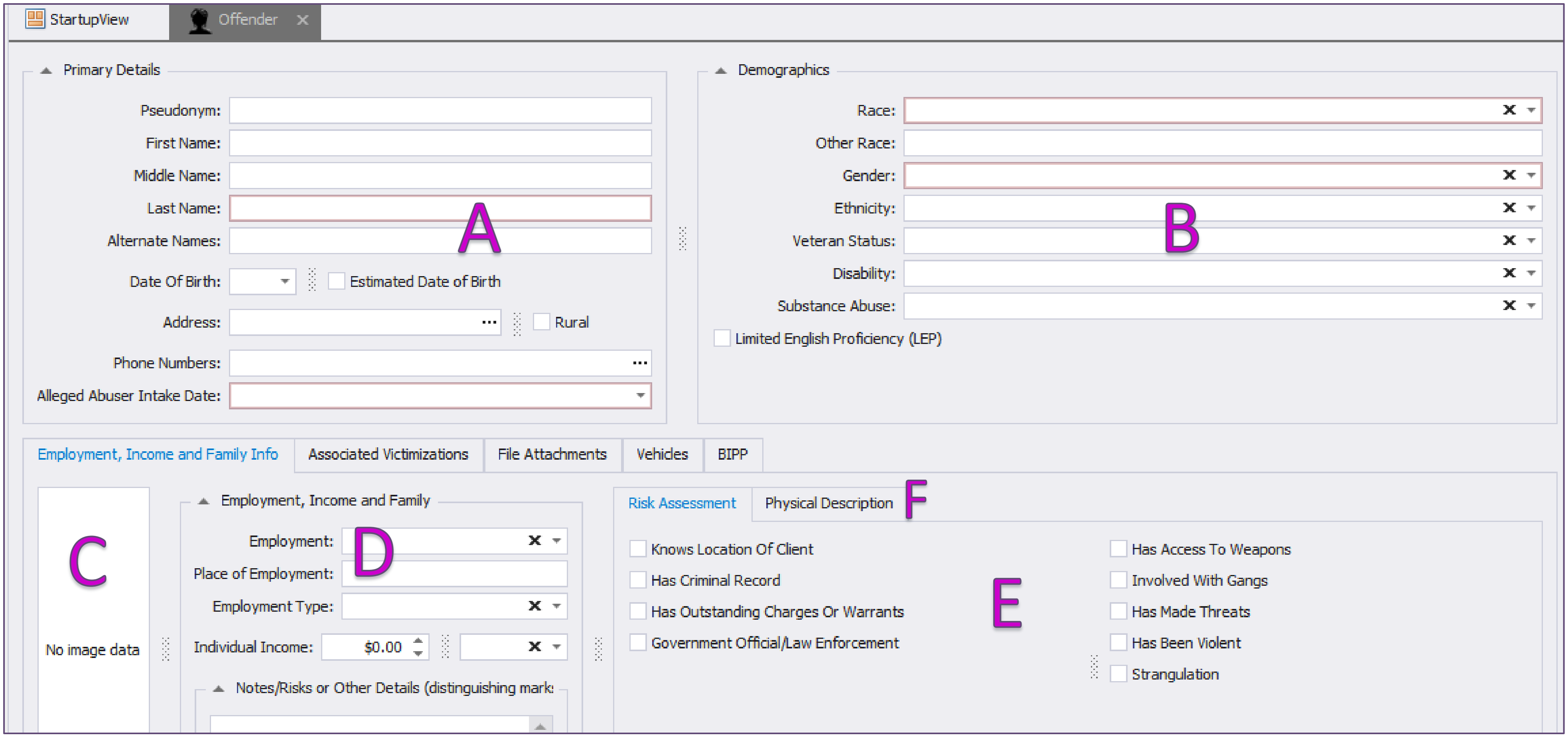
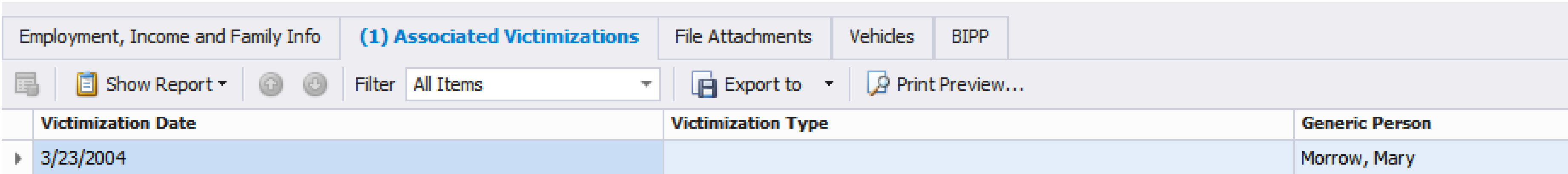
Creating a New Offender Record

There are a few ways to navigate to the Offender section of Osnium-Texas. To create a new offender while you are in another section, click "New" at the top left of the screen, and select "Offender." To navigate to the Offender section from the Startup View, click the navigation button on the top left, select "Persons," and then "Offenders Only." This will bring up the list of all the offenders in the system. From here, select "New" on the top left of the screen.

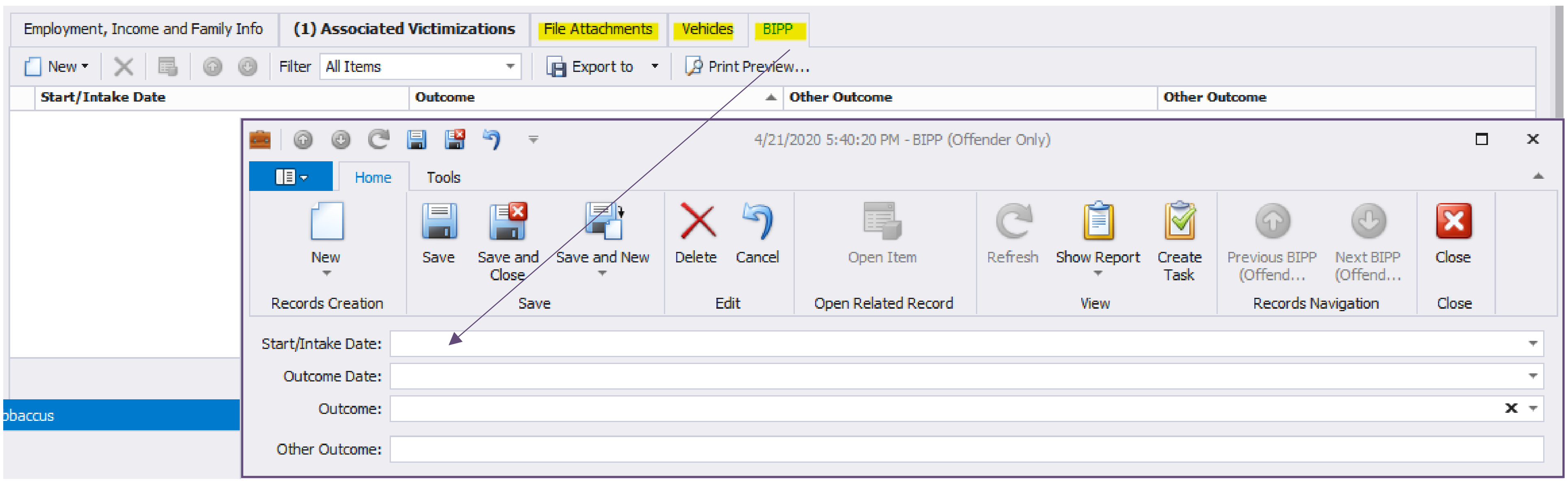
The offender screen allows you to input demographic and identifying information about offenders (boxes A and B). This screen also allows you to upload a photo of the offender (C), record information about the offender's job (D), note any distinguishing physical features or other details (E), and identify any additional risk factors (F). Behind the "Risk Assessment" tab, the "Physical Description" tab allows you to specifically describe the appearance of the offender. The other tabs on the offender page let you add more detail about the offender. These are discussed on the next page.



If a victimization record of a primary client has been tied to this offender, the victim's information will show up under the Associated Victimizations tab of the Offender screen.



The "File Attachments" tab allows you to upload documents to the offender's profile by clicking "New". Similarly, the "Vehicles" tab allows you to upload a description of the offender's vehicle. The "BIPP" tab allows you to record whether or not the offender is participating in a BIPP program, and there are four questions related to BIPP that are asked by VAWA.



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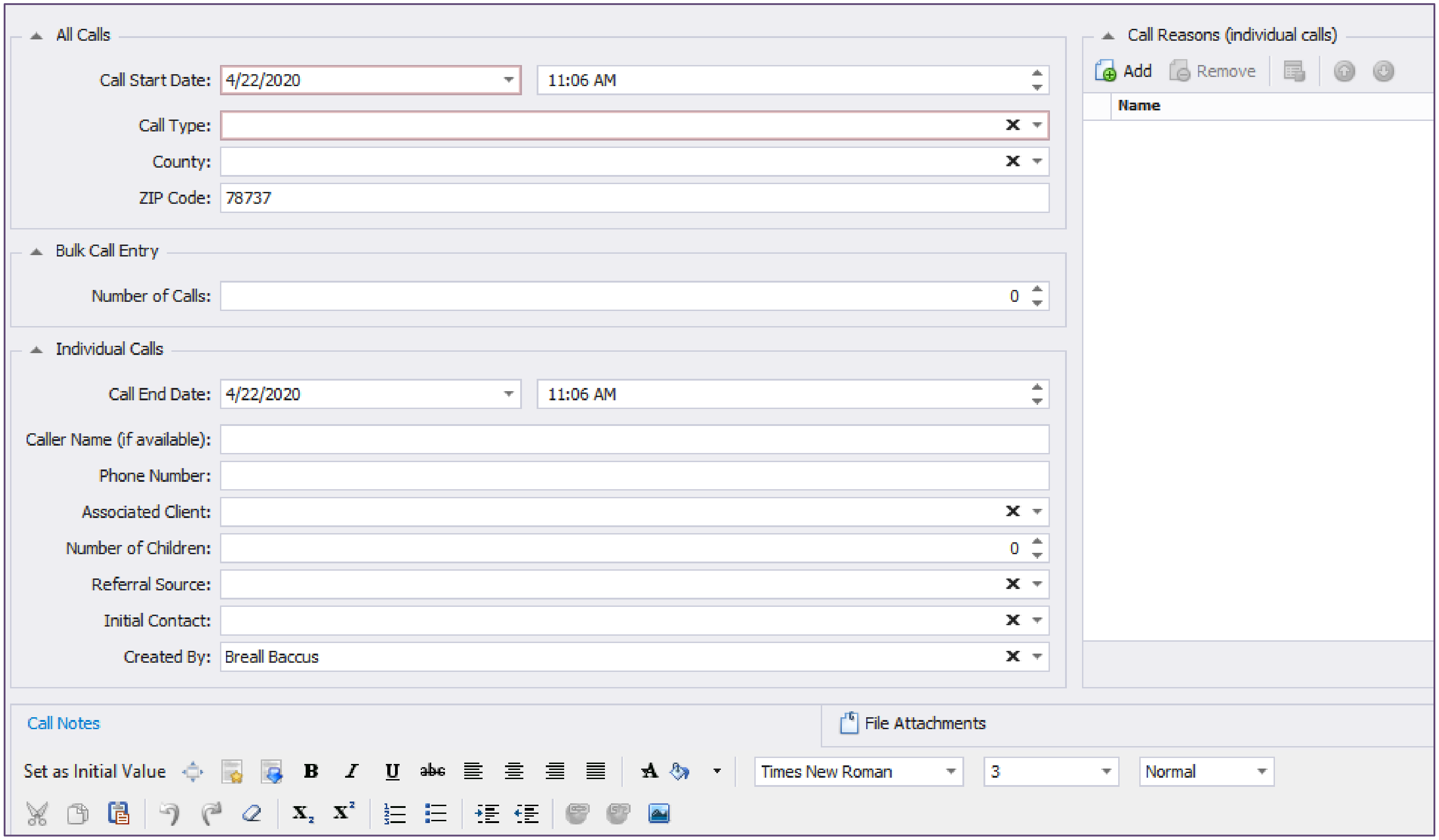
Hotline Screen

To navigate to the Hotline Screen, click the navigation button and click "Hotline." This will open the hotline module, pictured below.

To enter a single hotline call: Fill out the boxes labeled "All Calls," and "Individual Calls," Click "Save" at the top of your screen. To enter multiple hotline calls (bulk entry): Fill out the boxes labeled "All Calls" and "Bulk Call Entry." If you would like to add further details about the call, use the Call Reasons window on the right-hand side of your screen. This information will not be used for any funder reports but can be useful for internal tracking. Be sure to save.



Quick Tip

It is up to your program to decide if you'd like to enter hotline calls individually or in bulk at the end of the month. Whatever you choose, make sure all staff are consistent in their data entry method.

There is a Call Notes section at the bottom of the module for you to make notes as needed.

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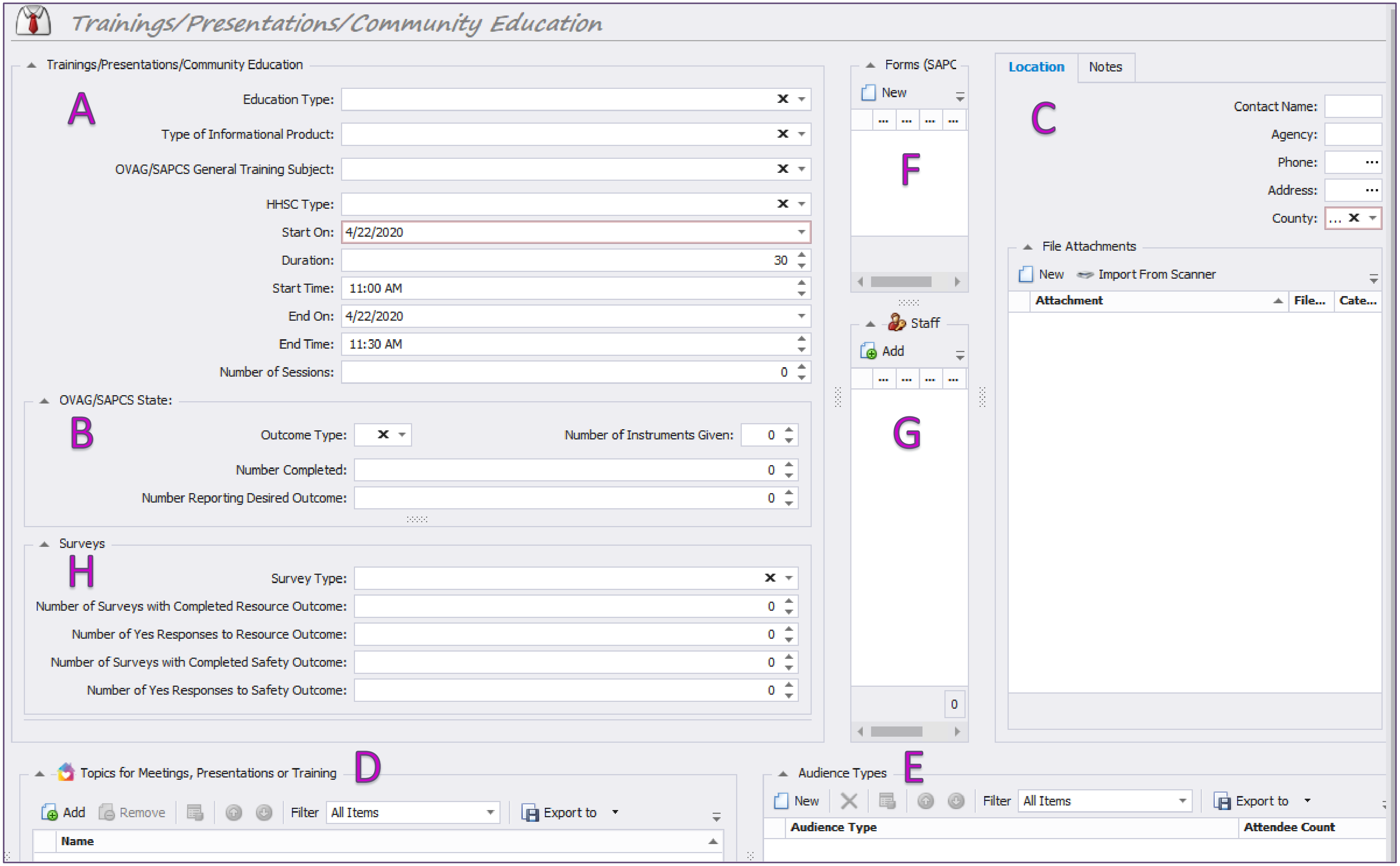
Trainings / Presentations / Community Education Screen

To navigate to this section of the system, click the navigation button on the top left portion of your screen, and select "Trainings/Presentations/Community Education." That will take you to the main screen for this module that will list all trainings/presentations/community education that you have entered and saved in the system. To enter a new record, click on "New" and choose "Trainings/Presentations/Community Education" and it will take you to the screen below.



You will start with the box towards the top left labeled “Trainings/Presentations/Community Education” (A). Choose the “Education Type” based on the type of presentation you are entering and the funding source for the presentation. Additionally, choose the date, time, and duration of the presentation. If you received HHSC funding and the training is attached to those outcomes, fill out the field labelled “HHSC Type.” If you receive OVAG/SAPCS funding and the training is attached to those outcomes, fill out the box labeled “OVAG/SAPCS State” (B). The “Outcome Type” field is empty, and programs can add different types needed for reporting.

For all records entered in this section, fill out the “Location” box (C), the “Topics for Meetings, Presentations, or Training” box (D), and the “Audience Types” (E) box as well. There is a space for notes behind the “Location” box—this is optional.

To choose a topic from the “Topics for Meetings, Presentations, or Training” box, click “Add,” then click “Go” to see all available options.

Similarly, for the “Audience Types” box, click “New,” then select the audience type from the drop-down box. If this was a presentation associated with CJD funds, choose an option for “CJD Professional Audience Type.” For most other funders choose from the “Audience Type” selections.

Only enter information into the “Other” write in box if you selected other for “CJD Professional Audience Type” or for “Audience Type.” Finally, be sure to enter the number of people who attended the presentation using the “Attendee Count” field.

The box labeled “Forms (SAPCS Federal….)” (F) is used to collect specific information for this particular funder as well as for a specific type of coordinated response under VAWA. Since SAPCS Federal’s questions are unique, there is a separate area to enter their data. Click “New” and choose SAPCS Federal and hit OK. When you click on “New” you will also see an option labelled “Specialized Units in the Criminal Justice System.”

Click “Add” on the “Staff” box (G) to select the staff who assisted with this training or event. Finally, be sure and click “Save” to ensure your record has been entered.

The Survey section (H) should be filled out when HHSC surveys were administered for this particular training/presentation/community education.

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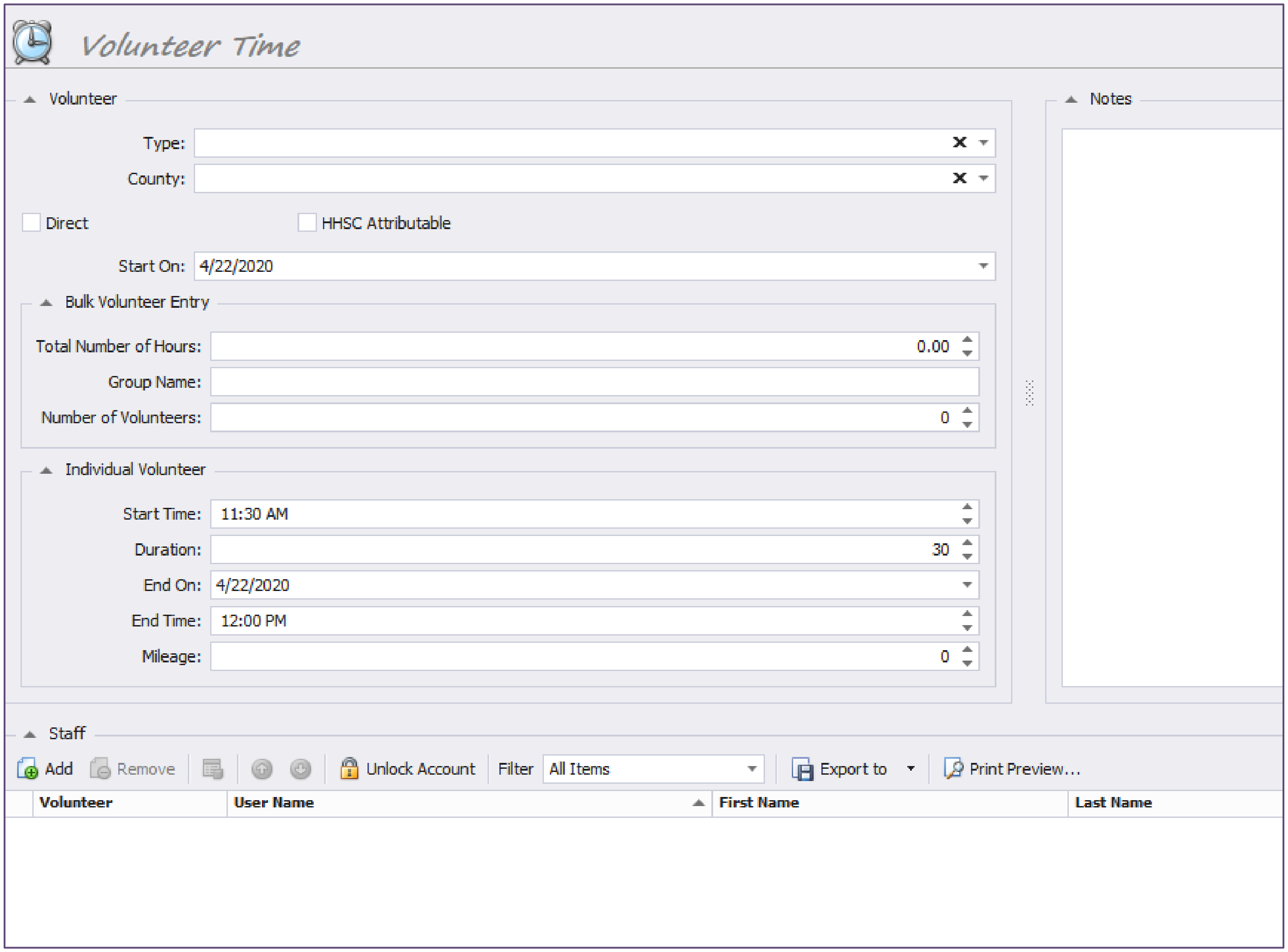
Volunteer Time Screen

This module is here to assist you in tracking your agency's volunteer efforts. You can choose to enter a volunteer activity individually or by bulk entry. Enter information for an individual volunteer if it is important to know the volunteer's name—add them in the Staff box at the bottom. Use the bulk entry if you have a group of volunteers perform a task, or if it is not important to know the volunteer's name. If you wish for the volunteer entry to be attributed to HHSC, be sure to check the HHSC Attributable checkbox.

Quick Tip

If you need to add a volunteer by name, make sure to add them as a staff member and select Volunteer as their Role.



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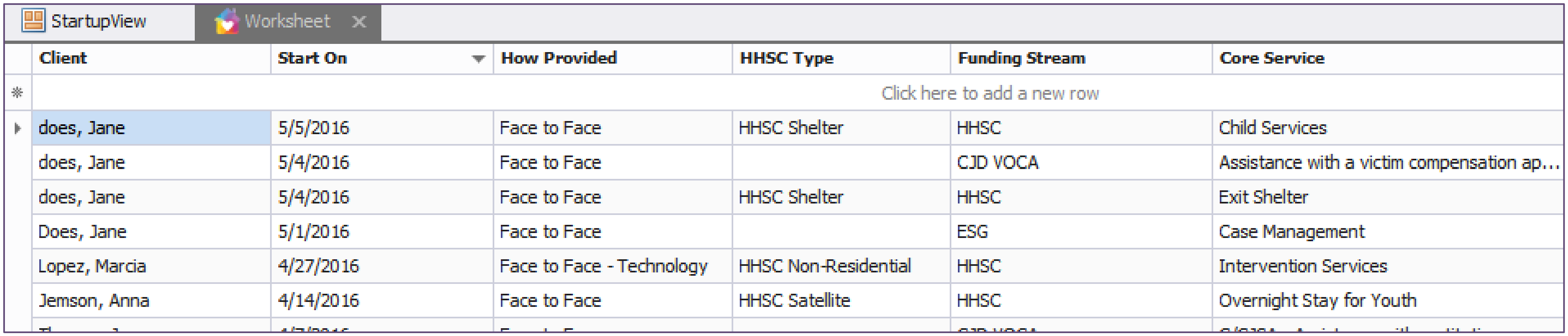
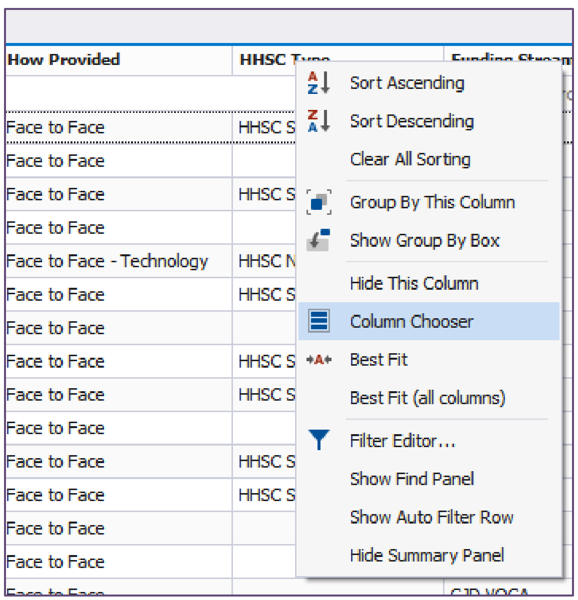
Other Options & Features of Osnium-Texas

Above we have outlined the standard features of the system and the ones that you will likely be utilizing the most. Below, are some brief explanations of some optional features that each agency can choose to utilize.

Services Worksheet

The services worksheet allows you to bulk enter services, and this is an optional feature that you may want to utilize when entering services. You can find this on the main startup view screen, as well as by accessing it from the upper left-hand corner from the startup view screen. To use this worksheet, click the blank row at the top labeled “Click here to add a new row.” Fill out each section of the grid to save the service.

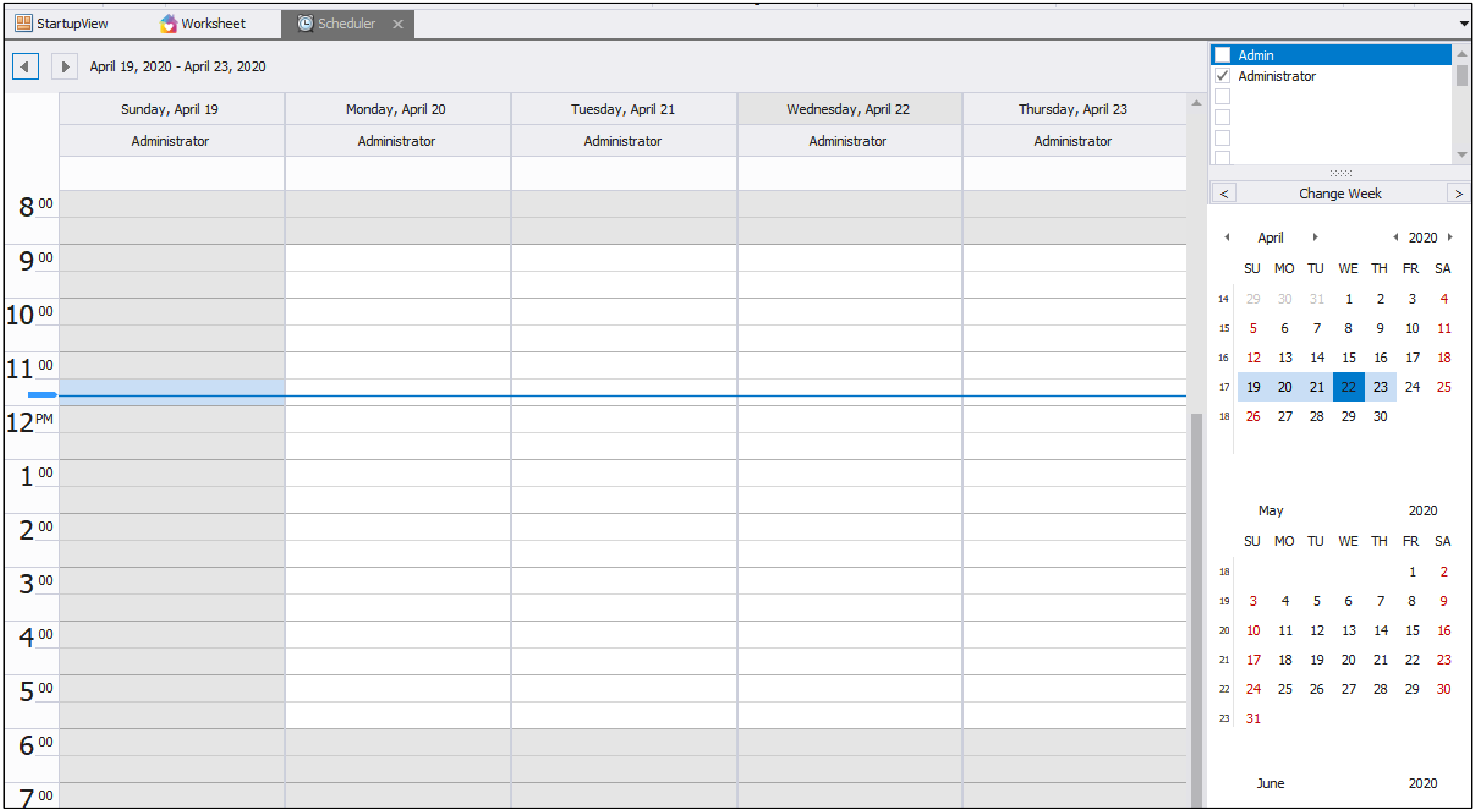




You can also add other columns to the worksheet, or any worksheet, by clicking on the header and selecting column chooser. You can find more information on adding columns on Creating Safer Spaces (password: Survivor1). You can also filter to find specific information, explained below.

Scheduler

Another optional feature, this allows users to maintain schedules. Each user can see the schedules of all other users. The Scheduler is designed to replicate a Microsoft Outlook calendar. Access the Scheduler by clicking on the button in the upper left hand corner of the screen, from anywhere in the system, choosing the "Other" folder, and then click on Scheduler. To learn how to utilize the calendar, please visit [Osnium's Documentation page](#).



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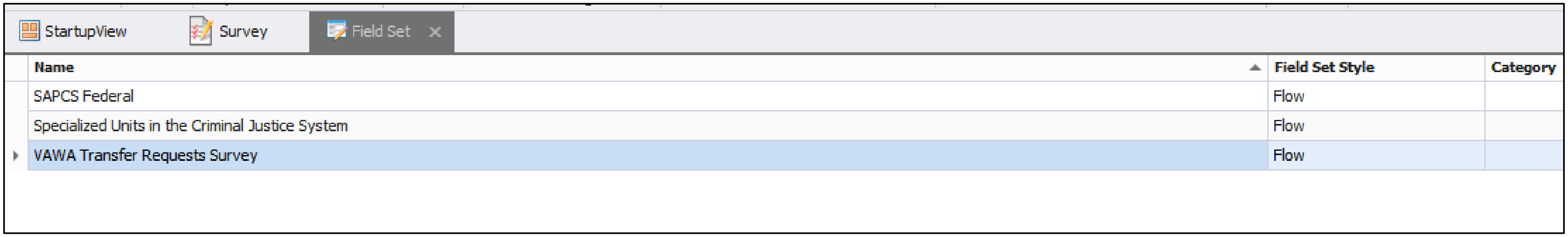
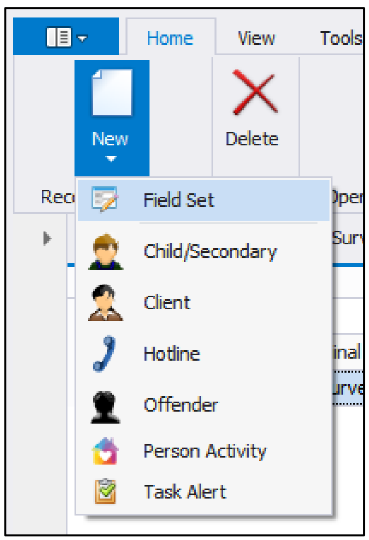
Field Set & Survey

These two sections (Field Set and Survey) work together when users create surveys. To get to the Field Set section, click on the Navigation button on the top left of your screen, then hover over “Other,” then select “Field Set.” To get to the Survey section, click on the Navigation button on the top left of your screen, then hover over “Other,” then select “Survey.”

In the image below, the Field Set section displays the three pre-loaded surveys set up in the system. SAPCS Federal and Specialized Units in the Criminal Justice System are two surveys associated with the Trainings/Presentations/Community Education module. The VAWA Transfer Request Survey is associated with the TDHCA ESG Report. If you are missing this report, please reach out to us at ta@datatx.info.

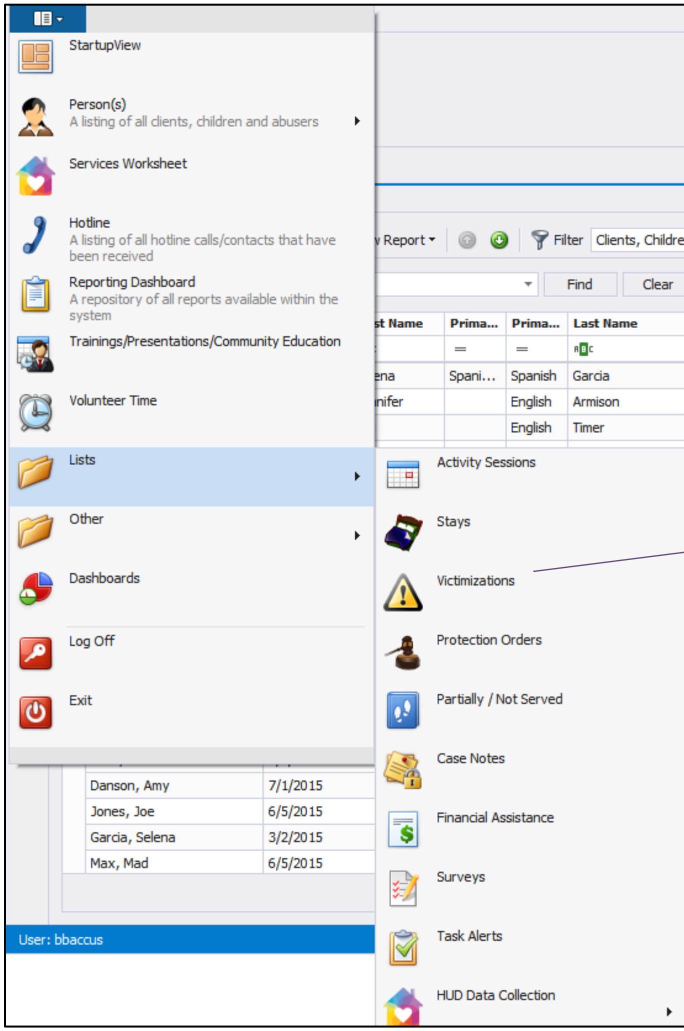


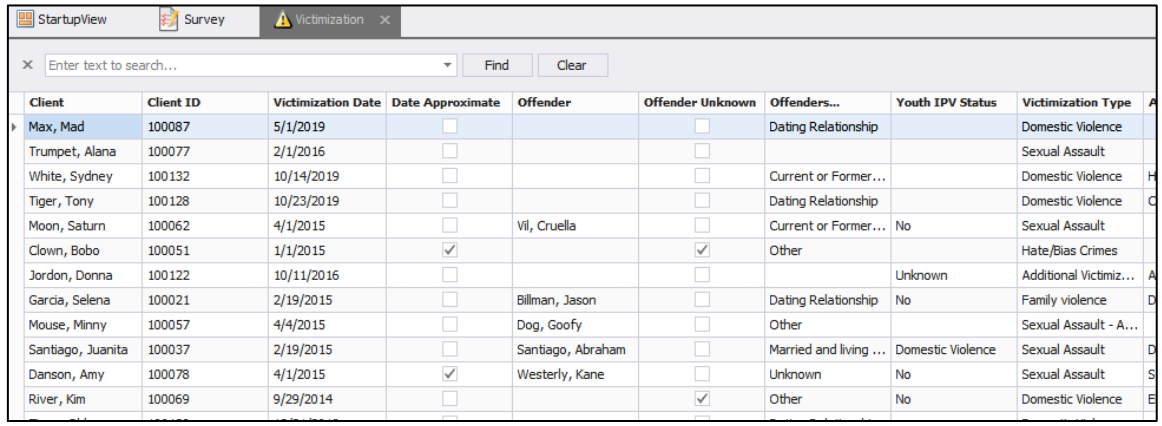
To create a new survey, choose “New” and click on “Field Set.” The following is the screen you will see to begin the process of creating a new Survey. You can also create a Survey by going to the same folder you did to access Field Set, click on Survey, and then New. Click here to view [Osnium’s documentation link]() that walks you through creating a survey with a short video tutorial.



Lists

The “Lists” section contains five different lists of data available to users in Osnium. For example, if a user wanted a list of all the victimizations entered into the system, that information can be accessed by clicking “Victimization” in the Lists folder.





Client	Client ID	Victimization Date	Date Approximate	Offender	Offender Unknown	Offenders...	Youth IPV Status	Victimization Type	A
Max, Mad	100087	5/1/2019				Dating Relationship		Domestic Violence	
Trumpet, Alana	100077	2/1/2016						Sexual Assault	
White, Sydney	100132	10/14/2019				Current or Former…		Domestic Violence	H
Tiger, Tony	100128	10/23/2019				Dating Relationship		Domestic Violence	C
Moon, Saturn	100062	4/1/2015		Vil, Cruella		Current or Former…	No	Sexual Assault	
Clown, Bobo	100051	1/1/2015	✓		✓	Other		Hate/Bias Crimes	
Jordon, Donna	100122	10/11/2016					Unknown	Additional Victimiz…	A
Garcia, Selena	100021	2/19/2015		Billman, Jason		Dating Relationship	No	Family violence	D
Mouse, Minny	100057	4/4/2015		Dog, Goofy		Other		Sexual Assault - A…	
Santiago, Juanita	100037	2/19/2015		Santiago, Abraham		Married and living …	Domestic Violence	Sexual Assault	D
Danson, Amy	100078	4/1/2015	✓	Westerly, Kane		Unknown	No	Sexual Assault	S
River, Kim	100069	9/29/2014			✓	Other	No	Domestic Violence	E

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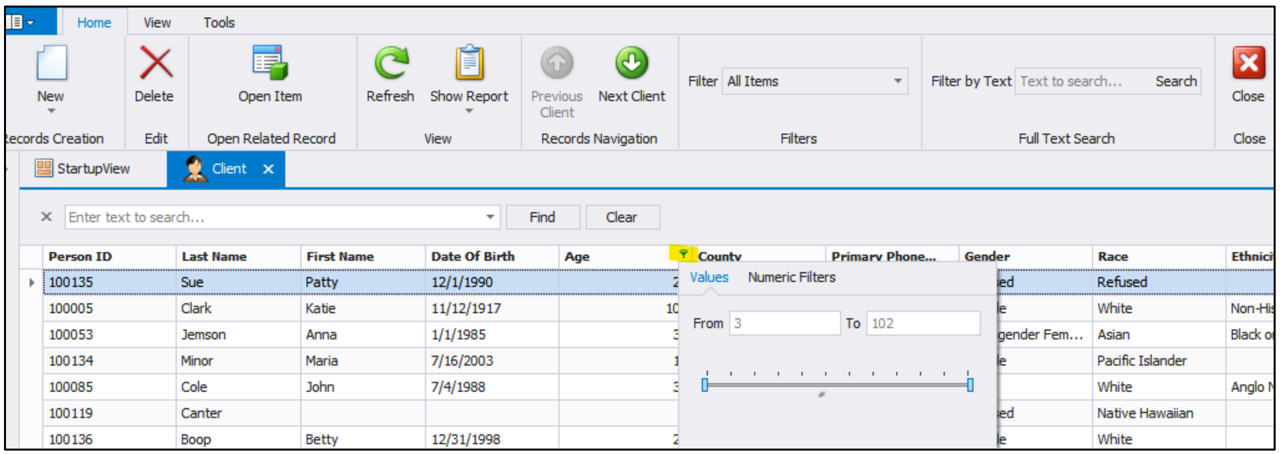
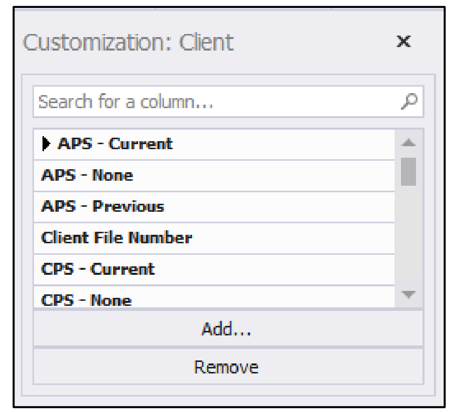
Querying and Filtering

You are able to sort, filter, and query data on any grid within the system. To filter, sort, and query data from clients, open up the client grid by clicking the navigation button on the upper-left. Hover over Person(s) and select Primary Only.

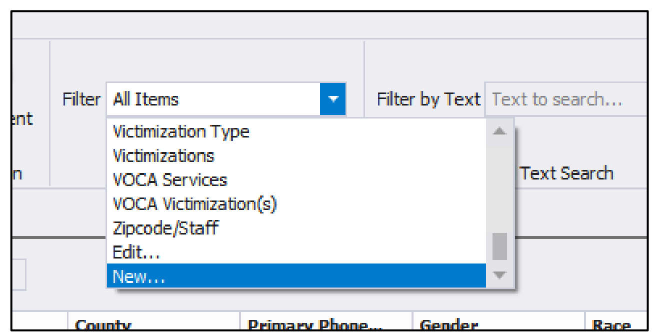
To sort the list of clients on any of the categories in the columns, click the column. To filter clients on one of these categories, click the small filter icon on the column header (circled below in red).

You can add or delete columns to the grid by right-clicking the column and selecting the "column chooser." To add a new column, click "Add." This will open up a list of fields that can be made into a column on the client grid. Highlight the field you want to add to the column and click "Add." This field will appear in the box on the lower right of the screen—drag the field you want to add as a column to the area you want the column to appear. To remove a column, click "Remove."





To filter clients based on multiple criteria, use the "Filters" box at the top of the screen. Select the drop down box and click "New..." at the bottom. Here, you can add multiple criteria to filter clients on—click the "+" to add a criterion. For more information on this process please visit [Creating Safer Spaces]() and view our training videos.



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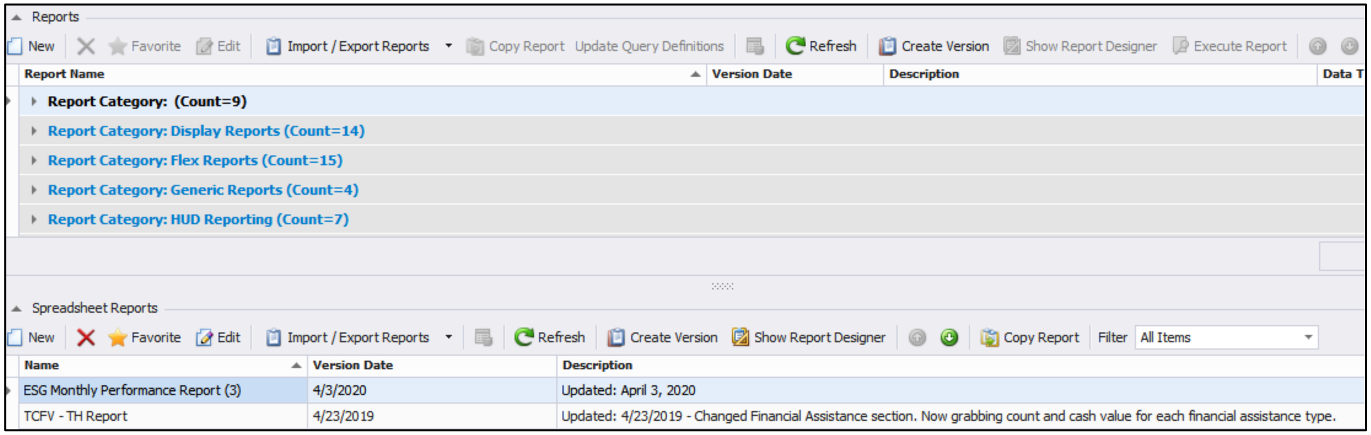
Reports

Navigate to this section by using the Navigation button on the upper left hand part of your screen, and click “Reporting Dashboard.” This section allows you to see all of the reports imported into the system. To open a report, double click the report, choose the dates you want the report to pull data from, and filter by parameters on the left side for specific information. Click “Submit.” From this screen, you can print the report or use the data to complete your report to the appropriate funder.

Keep in mind that reports may take more time if you have more data.

Some reports will have a “blackout date” in addition to a start and end date. The blackout date is usually the first day of the fiscal year that the funding agency uses (some funders go by the federal fiscal year, while others go by the state fiscal year). The blackout date represents the date that all clients become “new” again, and this date typically will not change throughout the grant reporting year.



Most reports are already in your system, and osnium can push out updates to reports automatically. You can find the version date in the grid, to see when it was last updated. If it is a newly created report, you may have to import it into your system. Appendix A contains a list of all reports and their uses within the Texas system. For more information on reporting, please view our training videos on Creating Safer Spaces. Reach out to ta@datatx.info if you are interested in making sure you have the most up to date reports.

Quick Tip

Osnium and TCFV no longer support the use of the Funder Reports, such as VOCA, OVAG, and VAWA. Flex Reports should be able to pull all necessary data, except for HUD data, which have specific reports in the dashboard.

Conclusion

For more information, or questions you may have regarding the overall system, please refer to the recorded Osnium training webisodes on Creating Safer Spaces (pw: Survivor1). Please feel free to reach out to TAASA and TCFV at ta@datatx.info or to TCFV at DataTX@tcfv.org.

Osnium has helpful documents on their website. You can utilize your support hours and reach out to Osnium’s support staff by emailing support@osnium.com.

We thank the Criminal Justice Division at the Office of the Governor for their support of this project. We would also like to thank the Texas Association Against Sexual Assault (TAASA) for embarking on this joint project with TCFV and the pilot agencies across the state who provided many hours of support and guidance in the development of this system along with the Osnium team.

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Appendix A: Reports

Flex Reports: Flex Reports tell you how many clients or services were entered during the selected time frame. These have been built to be able to pull information by many parameters including by funder. You can pull multiple funders by holding CTRL when selecting fields in the drop-down.	
BIPP Flex Report	This report pulls BIPP information for Offenders entered into Osnium.
Protection Order Flex Report	This report pulls information about protective orders from the protective orders tab entered in the client page for the selected time frame .
Services Flex Report	Only Use this services report for older services (FY18 and before). If you are not seeing all your services, please use the Services Flex Report- Created Date.
Services Flex Report - Created Date	In most cases, you will use this report to pull services. The created date field was added in a more recent version of Osnium, so not all services have a created date. If pulling older services and they do not show in this flex report, try running the Services Flex Report.
Training/Presentation Flex Report	This report pulls information from the Trainings/Presentations/Community Education Page during a selected time frame.
Demographics Flex Report	This report pulls client demographic information for clients who received services during a selected time frame.
Survey Flex Report	This report pulls information from surveys entered within the survey tab during a selected time frame. These surveys are built for specific reasons. If you do not utilize specific surveys, this will not pull any information.
Victimization Flex Report	This report pulls in victimization information for clients that have received a service within the selected time frame.
Generic Reports	
Hotline Report	Pulls all hotline calls for the selected time frame, with details.
Stays Report	This report pulls information about clients with stays reported specifically in the Stays tab during the selected time frame. This does not pull in HHSC Enter Shelter or Exit Shelter Services. The newest version has the ability to sort by funder, which can be helpful for programs with more than one funder paying for housing nights for clients.
Volunteer Time Report	Pulls volunteer time reported during a specific time frame.
HUD Report	

HUD COC APR and ESG CAPER- FY2020	Used to pull data needed for those receiving HUD ESG and COC funds. Most of this data is being pulled from Project Entries and Project Exists entered in the stays module.
Texas Specific Reports	
Hotline Calls	This report pulls all HHSC eligible hotline calls between a selected time frame.
Nonresidential Monthly Statistics	This report counts new and returning clients and HHSC services days for nonresidential services.
Presentation and Education	This report pulls in HHSC eligible presentations and trainings entered between a selected time frame.
Shelter Monthly Statistics	This report counts HHSC shelter days for clients with an enter and/or exit shelter service between a selected time frame.
Victimizations Only	Do not use.
TH Report	This report pulls information needed for the CJD-VOCA Transitional Housing Grant. For more instructions about this grant, please see the TH Osnium Report Guidance attached. *This report is a spreadsheet report, and must be imported in the Spreadsheets Reports tab on the reporting dashboard.*
Texas ESG Performance Report	This report pulls information for the TDHCA Monthly Performance Report for ESG funding. *This report is a spreadsheet report, and must be imported in the Spreadsheets Reports tab on the reporting dashboard.*
Display Reports: These reports are designed to create a printable document on the object you are running it for. You should run these on the page/module you are looking to print the information from. For more information, visit the Osnium Document here: How to Use Display Reports	

These funder-specific reports are no longer being updated, and ***should not be used for reporting purposes.***

- Victimizations Only Report under (report category:)
- OVAG
- SAPCS Federal and SAPCS State Reports
- SASP
- VAWA Reporting
- VOCA Reporting
- HUD COC APR and ESG CAPER versions 1.0.36, 1.1.7, 1.1.6, 1.23, or HUD CoC APR 2017

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