

# OSNIUM-TEXAS USER GUIDE



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 [TCFV's Data and Funder Reporting Page](#).

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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) and Consolidated Annual Performance and Evaluation Report (CAPER)
- 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)
  - 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 or add components, be aware that any changes to 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, and is a complement to the [Osnium Training Series](#), other TCFV created reporting guides, and Osnium's website.. These can all be found on TCFV's [Data and Funder Reporting](#) 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 hosted on a personal agency server, 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. The best practice would be every 24 hours.

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, and that no information is required to provide services.

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](mailto:datatx@tcfv.org).

## Setting Up Users & Roles

Each person who uses Osnum-Texas must have their own username and password. This is in order to track who enters information if needed in the future. Please refer to the step-by-step instructions [in this section](#) of Osnum's documentation link to set up your staff members with their own Username and Password. Each staff member need to be assigned a role to allow for certain permissions depending their role at the agency.

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.

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. This may be helpful to track volunteer information without the volunteer accessing 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.

### **Quick Tip:**

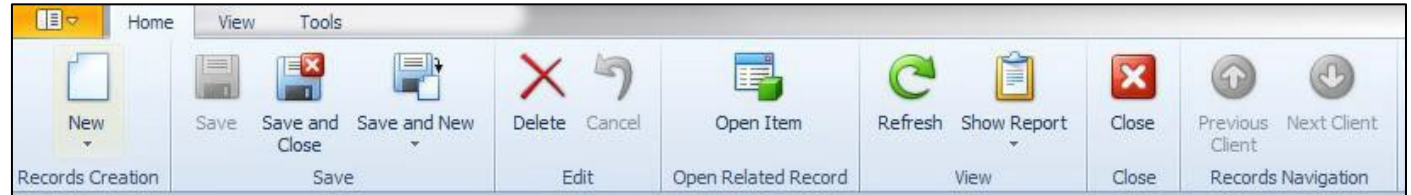
If you are the Administrator and will also be entering data into the system, it is suggested that you create two accounts- one as Staff (limited) for entering data only and one just as an Administrator. This will limit accidentally deleting or changing something in the system.

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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 record you're working on, or navigate to a new record. 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 household member’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, names, or addresses. 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. You may have to save multiple times, such as a service and then the client record after the service closes. 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 options that are required by funders. Adding or removing options may affect the data that the system can report to funders. Exercise caution in adding or deleting the values.

# Startup Screen

Upon opening Osnum-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.

The screenshot displays the 'StartupView' window for the date 4/15/2020. The interface is divided into several sections:

- Navigation and Tools:** Includes a navigation pane on the left and a top toolbar with options like Home, View, Tools, Navigation, Appearance, and Windows.
- Client List (A):** A table listing clients with columns for Person Type, Person ID, First Name, Last Name, Gender, Race, Date of Birth, and County. The client 'Katie Clark' is highlighted.
- Client Details (B and C):** A detailed view for 'Clark, Katie' showing primary details (Name, Date of Birth) and demographics (Race, Ethnicity, Gender, Address, Phone Numbers).
- Services Worksheet (D):** A table for entering services with columns for Client, Start On, How Provided, HHSC Type, Funding Stream, Core Service, Service Location, and Residential. The table includes a 'Click here to add a new row' link.

Person Type	Person ID	First Name	Prima...	Prima...	Last Name	Gender	Race	Date Of...	County
Client	100005	Katie	Ameri...		Clark	Female	White	11/12/1917	Tarrant
Client	100134	Maria	English	Minor	Minor	Female	Pacific Islan...	7/16/2003	Wood
Client	100135	Patty	English		Sue	Refused	Refused	12/1/1990	Anderson
Client	100119		Arabic		Canter	Refused	Native Haw...		Anderson
Client	100136	Betty	English		Boop	Female	White	12/31/1998	Travis
Client	100085	John	English		Cole	Male	White	7/4/1988	Harris
Client	100053	Anna	Other	French	Jemson	Transgender Fe...	Asian	1/1/1985	Anderson
Client	100045	Rose	Korean		Burson	Female	Asian	1/1/2015	Anderson

Client	Start On	How Provided	HHSC Type	Funding Stream	Core Service	Service Location	Residential
does, Jane	5/5/2016	Face to Face	HHSC Shelter	HHSC	Child Services		<input type="checkbox"/>
Armison, Jennifer	4/8/2015	Face to Face - Technology	HHSC Satellite	HHSC	Intervention Services	Office	<input checked="" type="checkbox"/>
does, Jane	7/7/2016	Face to Face	HHSC Shelter	HHSC	Overnight Stay for Youth		<input type="checkbox"/>
Danson, Amy	7/1/2015	Face to Face	HHSC Shelter	HHSC	Overnight Stay for Youth	Office	<input type="checkbox"/>
Jones, Joe	6/5/2015	Face to Face	HHSC Shelter	HHSC	Enter Shelter	Partner Office	<input type="checkbox"/>
Garcia, Selena	3/2/2015	Face to Face	HHSC Shelter	HHSC	Child Services		<input type="checkbox"/>
Max, Mad	6/5/2015	Face to Face	HHSC Shelter	HHSC	Enter Shelter	Outreach Office	<input type="checkbox"/>
Wayne, Bruce	6/4/2015	Face to Face	HHSC Shelter	HHSC	Enter Shelter	Hospital	<input type="checkbox"/>
Max, Mad	7/7/2015	Face to Face	HHSC Shelter	HHSC	Exit Shelter		<input type="checkbox"/>

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 open a grid of all Clients and Household Members entered into the system. . Clients are usually survivors that have self-identified as being victimized and are seeking your services or the parent/guardian of a minor being brought in for services; Household Members are children or household members associated with a Client; 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. If you would like a list of all Clients, Household Members, and Offenders, click “Persons”. If you’d like a specific list, choose one client type. This will open a list of all clients in the system. To create a new client record, click “New” > Client.

Race	Dat...	Cou...	In Shelter
=	=	=	<input type="checkbox"/>
e Multi...		Cald...	<input checked="" type="checkbox"/>
Multi...	2/1...	Cald...	<input type="checkbox"/>
Multi...	2/1...	Cald...	<input type="checkbox"/>
e Multi...	1/1...	Cald...	<input checked="" type="checkbox"/>

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## Main Client Screen

The next page shows the Main Client Screen. The Main 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 Osnum 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 a HUD entry, and we will address that tab later in this manual. Navigate through the different sections of a client’s file from this screen. Additionally, the Household Member includes all the same fields as 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 unless the client is returning after a long period of time. When this intake date is updated may be something you decide to address with an internal policy. 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.



## Main Client Screen

The screenshot displays the 'Main Client Screen' interface. At the top, there are tabs for 'StartupView' and 'Client'. The main area is divided into three primary sections: 'Primary Details', 'Demographics', and 'Identifiers'. Below these is a horizontal row of tabs for 'Other Information', 'Household Members', 'Victimization', 'Services', 'Shelter / Stays', 'Related Crisis Hotline', 'Protection Orders', 'Case Notes', 'Financial Assistance', 'Referrals', 'Emergency Contact Information', and 'Attachments'. The 'Victimization' tab is currently selected and highlighted. Below the tabs is a toolbar with 'New', 'Export to', and 'Print Preview...' buttons. At the bottom, a table header is visible with columns: 'Date Reported', 'Date Of Victimization', 'Primary Offender', 'Offender...', 'Victimization Type', 'Other Victimization Type(s)', 'Assault Location', 'County of Incident', and 'Is Main Victimization'. A blue arrow points from the 'New' button in the toolbar to the text below.

**Primary Details**

Client ID: 0  
Intake Date:  
First Name:  
Middle Name:  
Last Name:  
Alternate Names:  
Pseudonym:  
Date Of Birth:  
 DOB Unknown  DOB Refused  
 DOB Unknown Adult  DOB Unknown Child  
 Estimated Date of Birth Age: 0

**Demographics**

Gender:  
Race:  
Other Race:  
Ethnicity:  
Primary Language Spoken: English  
Primary Language Other:  
Highest Education Completed:  
Current Victimization:  
Veteran Status:  
TANF/SSBG Eligible:  
TANF/SSBG Date:  
 Limited English Proficiency (LEP)  Needing Language Services  
 Discuss Asylee, Immigration, Refugee Information  Self-Identified as LGBTQ  
 Experiencing Homelessness  Incarcerated

**Identifiers**

ID/ITS Number/Alice ID:  
Client File Number:  
**Contact Information**  
County of Residence: Bexar  
Address:  
Phone Numbers:  
Geographic Location:  
Email Address:  
Email Restrictions:  
Advocate/Case Manager:  
Counselor/Therapist:

**Victimization**

Other Information Household Members **Victimization** Services Shelter / Stays Related Crisis Hotline Protection Orders Case Notes Financial Assistance Referrals Emergency Contact Information Attachments

New Export to Print Preview...

Date Reported	Date Of Victimization	Primary Offender	Offender...	Victimization Type	Other Victimization Type(s)	Assault Location	County of Incident	Is Main Victimization
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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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## Other Information Tab

Go to the main client screen, and select the tab labeled “Other Information.” The box on the left labeled “Non-HUD Related” collects various information regarding employment status, income, and household size. As it states, this is not related to the HUD report and does not pull into the HUD APR/CAPER report. Main Referral source is a field you can customize to help track where survivors hear of your services. There is a separate tab for you to track referrals you provide to survivors.

“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. Lastly, this section includes a place for you to track the survivor identified disabilities. It is a multi-select box where you can add as many values as you’d like. This is where you track disabilities for VOCA reporting. The Accessibility/Accommodation box is available to take notes of specific information for that client.

The screenshot displays the 'Other Information' tab with the following sections:

- Non-HUD related:** Includes fields for Primary Referral Source, Other Referral Source, Employment Status, Primary Income Source, Individual Income (with a \$0.00 value), a checkbox for Head of Household, Household Size (with a 0 value), and Household Income (with a \$0.00 value).
- Current or Previous CPS/APS Inv:** Contains sub-sections for CPS Involvement and APS Involvement, each with checkboxes for Current and Previous.
- Survivor Identified Disabilities:** A multi-select list with options: Blind/visually impaired, Cognitive, Deaf/hard of hearing, Developmental, Has Service Animal, Intellectual, Mental, and Physical. It includes 'Add', 'Remove', and 'Bulk Add' buttons.
- Accessibility Accommodations:** A text area for notes, with a 'Set as Initial Value' button and a 'Design' button.

We will skip over the Household Members tab and address it further down in the guide.

### **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 Main client screen.

The screen below shows the fields available to record for victimization. Each funder requires different information about victimization. Please review funder guidelines to know what information is required by each funder. TCFV has a [victimization grid](#) that may also be helpful to review.

You will want to enter the main victimization the client reports as the Victimization Type. If you are reporting to HHSC, you will also fill out the HHSC Abuse Type check boxes. To report more than one victimization under one victimization record, select those under the “Other Victimization Type” multi-select. Click “New” and add as needed for VOCA, OVAG, or VAWA grants. To connect a secondary victim, such as a child, to a victimization, click “Add” under the VOCA Secondary Victims multi-select. Keep in mind, the client or Household Member will need to already have a record in the system to add them as a secondary victim.

If a client reports a new victimization in the future, you can create a new record with a new incident date. It will then ask you what victimization you would like to be the primary. Ensure you keep the primary victimization up to date. Remember to click Save on the Victimization AND the Client record to fully save!

The screenshot displays the 'Victimization Information' form with several sections:

- Victimization Information:** Fields for Date Reported, Date Of Victimization (with a checkbox for 'Date Of Victimization Estimated'), Age At The Time Of Victimization, County of Incident, Victimization Type, Youth IPV Status, and Assault Location.
- HHSC Abuse Types:** A list of checkboxes for Physical, Emotional/Psychological/Verbal, Stalking, Sexual, and Refused.
- Offender Information:** Fields for Primary Offender (with a dropdown and 'Offender Unknown' checkbox) and Offenders Relationship to Survivor (with a dropdown).
- Other Victimization Types:** A multi-select menu with an 'Add' button and a table with columns: Funding..., Name, Last..., First..., Age, Gender, Person Type.
- VOCA Secondary Victims:** A multi-select menu with an 'Add' button and a table with columns: Last..., First..., Age, Gender, Person Type.
- Victimization Notes:** A large text area for notes.

A dialog box titled 'Main victimization?' is overlaid on the right side of the form. It contains the text: 'Would you like to make this victimization record the primary victimization for Green, Rachel?' and two buttons: 'Yes' and 'No'.

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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 VOCA, 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. Depending on your agency, this may be different than who is entering the service.
- **Core Service:** What service you choose will depend on your agency’s data reporting methodology and service definition provided by the funder and in line with your billable funding sources based on your position. If your agency tracks services not allocated to a state funder, an administrator of your system can add a new funding stream under Core Service.
- **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.
- **Service Location:** Location at which the service was provided. This is not required by funders and can be customized by your agency.  
**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.

The screenshot shows a software interface for entering service data. The top navigation bar includes 'Home' and 'Tools'. The 'Tools' menu is open, showing options like 'New', 'Save', 'Save and Close', 'Save and New', 'Copy', 'Delete', 'Validate', 'Cancel', 'Open Item', and 'Refresh'. Below the navigation bar, the 'Service' form is displayed. It includes fields for 'Staff Member' (Breall Baccus), 'Core Service' (Child Services), 'HHSC Type' (HHSC Shelter), 'County' (Travis), 'Date' (8/24/2023), 'Start Time' (3:30 PM), 'Duration In Hours' (0.50), 'Duration in Minutes' (30), 'How Provided' (Face to Face), and 'Service Location'. A 'Residential' checkbox is present and unchecked. Below the form is a 'Service Case Notes' section. On the right side, there is a table with columns 'Person...', 'Client ID', and 'Full Name'. A search bar above the table contains the text 'Enter text to search...'. The table lists several clients, including Nymn, Psue, Zee, Gabby, Green, Rach, Teen, Stacie, Smith, Kate, Smith, Benn, Client, Child, Client, Test, Smith, Katie, and Smith, Bill.

Person...	Client ID	Full Name
Client	100179	Nymn, Psue
Client	100177	Zee, Gabby
Client	100175	Green, Rach
Client	100171	Teen, Stacie
Househol...	100170	Smith, Kate
Client	100168	Smith, Benn
Househol...	100166	Client, Child
Client	100165	Client, Test
Househol...	100164	Smith, Katie
Househol...	100163	Smith, Bill

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. Note that this information does not pull into the “Case Note” tab.

The window to the right of the services screen (A) gives you the ability to enter multiple clients who received this same service, referred to as “batching”. An example when this would be helpful is if you need to enter a support group service for all clients that attended. 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.

To enter multiple services for the same client, you can click “Save and New” at the top. It will save the service and create a new service record for you to update with the new information. This helps enter services faster. Lastly, if you click Tools (B) show audit trail, this shows you who entered the service and made changes you can see the staff member’s login. This is helpful in fixing errors or for training purposes. This audit trail is available in most areas of the system. As you can see in the example below, if you scroll to the bottom of the audit trail, it shows the service was created on 8/18/2023 by username bbaccus.

Audit trail info for Client Service "WS.Module.Models.Clients.GenericPerson\_Activity(ff287e7b-7674-4837-9707-00a8482a82a0)

Name: Audit trail info for Client Service "WS.Module.Models.Clients.GenericPerson\_Activity(ff287e7b-7674-4837-9707-00a8482a82a0)

^ - Audit Trail

All Items

User Name	Modifie...	Operation Type	Property Name	Description	Old Value
bbaccus	8/18/2023...	InitialValueAssi...	Cancelled	InitialValueAssigned; WS....	N/A
bbaccus	8/18/2023...	InitialValueAssi...	ActivitySession	InitialValueAssigned; WS....	N/A
bbaccus	8/18/2023...	InitialValueAssi...	NoShow	InitialValueAssigned; WS....	N/A
bbaccus	8/18/2023...	InitialValueAssi...	GenericPerson	InitialValueAssigned; WS....	N/A
bbaccus	8/18/2023...	InitialValueAssi...	OutstandingFees	InitialValueAssigned; WS....	N/A
bbaccus	8/18/2023...	InitialValueAssi...	County	InitialValueAssigned; WS....	N/A
bbaccus	8/18/2023...	ObjectCreated		ObjectCreated; WS.Mod...	N/A

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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. No information needs to be filled out here if the client is only receiving non-residential services. This tab is also where you collect information related to the HUD APR/CAPER and TDHCA ESG reports. If you do not receive HUD funding, the most frequently fields used will be:

- Stay Type: To differentiate between which funder program you are billing this client to, choose the correct funding stream and housing under “Stay Type”. If they are in your emergency shelter, just choose “Emergency Shelter.
- Stay location is customizable to your agency. If you enter a Program Entry Date and Program Exit Date, the Total Nights field will automatically populate. If you do not receive funds, these are all the fields you may need to fill out in the top section.
- Pets: If your agency provides foster or in shelter care of pets. Click new to add the pet name, type of pet, and pet location.
- If you are entering a stay for a client with children also staying in shelter, you may add the children under Household information by clicking “New” and selecting the Household Member record for the child. Note the child record will need to be set up first before you can do this. If the child is selected, this same stay will be copied over to their record when you Save and Close.

The screenshot displays a software interface for managing shelter stays, organized into several panels:

- Admission Info:** Includes fields for Person, Program Entry Date (8/24/2023), Program Entry Time (4:01 PM), Stay Type, Stay Location, Prior Living Situation, HUD Housing Status At Admission, and Coordinated Entry Assessment Score (0.00).
- Discharge Info:** Includes Total Nights (0), Program Exit Date, Program Exit Time, HUD Destination (at exit), and Housing Status At Discharge.
- HUD Information:** A table with columns for Collectio..., Eff..., Dat..., Las..., Fed..., Clie..., and Proje....
- Household Information:** Includes Head of Household and a table with columns for Person, Progra..., Progra..., and Shelter....
- Pets:** Includes a table with columns for Pet Name and Pet.

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. You will also need to make sure your HUD projects are set up correctly in Osnum before entering information. HUD requires this to be filled out at Project Entry, Project Update, or Project Exit. For more information on HUD data collection, review the resources on the [TCFV website](#) and Osnum [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.

The screenshot shows a web form with several sections and tabs. The tabs at the top are: Person Details, Health Information, Income Sources, Benefits and Health, Coordinated Entry, and Notes. The form is divided into several sections:

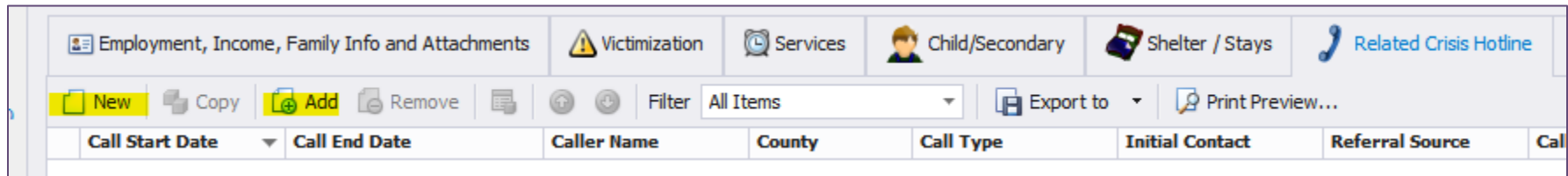
- Project Details:** Includes fields for Person ID (0), Client Location (Missing), Project Location (with a clear button), and HUD Assigned CoC Code (TX-000).
- Personal Information:** Includes First Name, Middle Name, Last Name, Suffix, Name Type (Missing), SSN, SSN Type (Missing), Date Of Birth, Date Of Birth Type (Missing), Race (Missing), Multiple Race Selection (N/A), Ethnicity (Missing), and Genders (N/A).
- Prior Living Situation:** Includes Type of Residence (Missing), Length of Stay Prior to Living Situation (Missing), Approximate Date Homelessness Started, Number Of Times Homeless in the last three years (Missing), and Number Of Months Homeless (Missing).
- Domestic Violence:** Includes Domestic violence victim/survivor (Missing), When did DV experience occur (Missing), and Are You Currently Fleeing (Missing).
- Veteran's Status:** Includes Veteran Status (Missing).
- Contact:** Includes Date Of Contact and Staying On Streets (No).
- Other Fields:** Relationship To Head Of Household (Missing), Residential Move In Date In Permanent Housing, and Date Of Engagement.

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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 an established client with a client record 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 Tab

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. It is not best practice to store evidence for survivors.

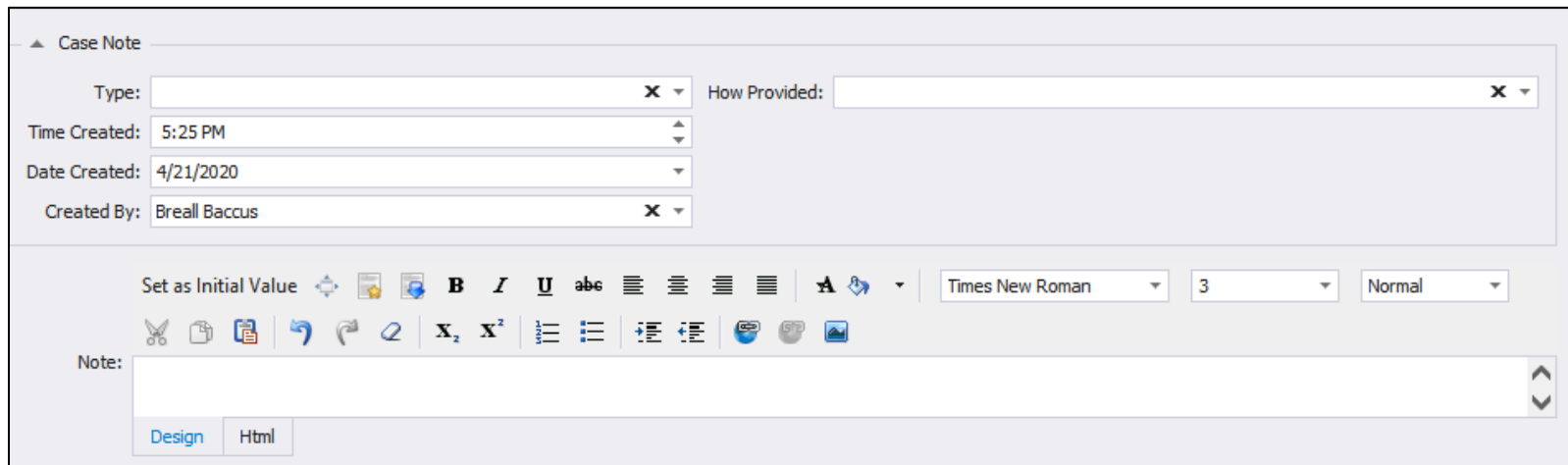
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## Case Notes Tab

This area is not for reporting purposes and is for each agency to utilize in a way that they see best. At TCFV, we have sample policies and a training on best practices of documentation that can assist in determining your policies around record generation and maintenance. For access to these resources, please reach out to [policy@tcfv.org](mailto:policy@tcfv.org).

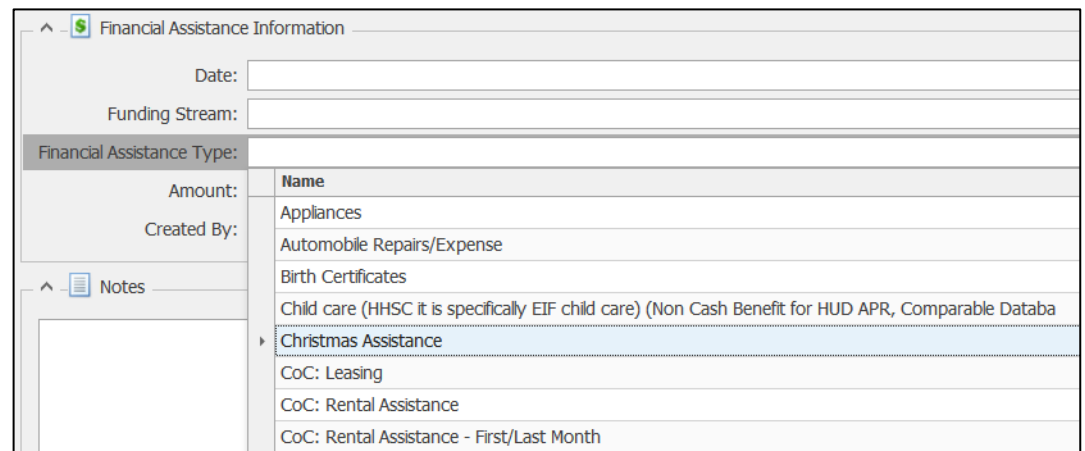
To enter new case notes, click “New.” Currently, there are no pre-programmed responses for the fields labeled “Type” and “How Provided.” Each program can customize these responses to meet their needs. Keep in mind that depending on the staff role you have designated, these case notes may be visible to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



The screenshot shows a web form titled "Case Note". It includes several input fields: "Type:" with a dropdown menu, "How Provided:" with a dropdown menu, "Time Created:" with a time selection field (5:25 PM), "Date Created:" with a date selection field (4/21/2020), and "Created By:" with a dropdown menu (Breall Baccus). Below these fields is a rich text editor toolbar with icons for undo, redo, bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, and insert image. The text editor is currently empty. At the bottom of the form, there are two tabs: "Design" and "Html".

## Financial Assistance Tab

This tab is used to track direct financial assistance provided to clients, and is customizable to what agencies are able to offer. Click on “New,” then click on “Financial Assistance.” (o enter a new Financial Assistance record, click “New,” then select “Financial Assistance.” Choose the FA Type, the Funding paying for the assistance, the Amount, and any Notes in the Notes Section. Save and Close.

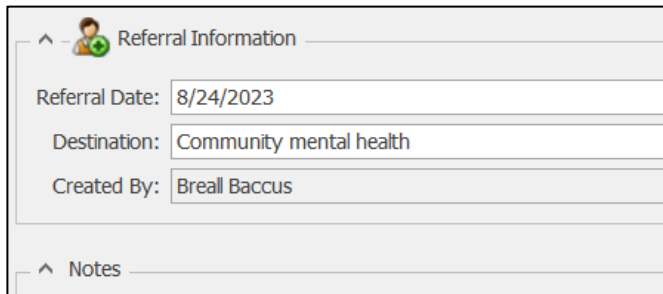
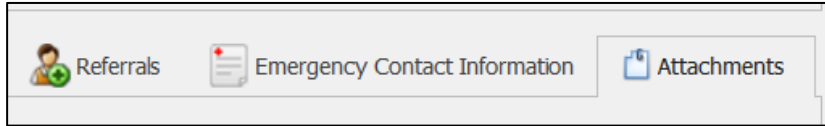


The screenshot shows a web form titled "Financial Assistance Information". It includes several input fields: "Date:", "Funding Stream:", "Financial Assistance Type:", "Amount:", and "Created By:". Below these fields is a list of "Financial Assistance Type" options, including: Appliances, Automobile Repairs/Expense, Birth Certificates, Child care (HHSC it is specifically EIF child care) (Non Cash Benefit for HUD APR, Comparable Databa), Christmas Assistance, CoC: Leasing, CoC: Rental Assistance, and CoC: Rental Assistance - First/Last Month. The "Notes" section is currently empty.

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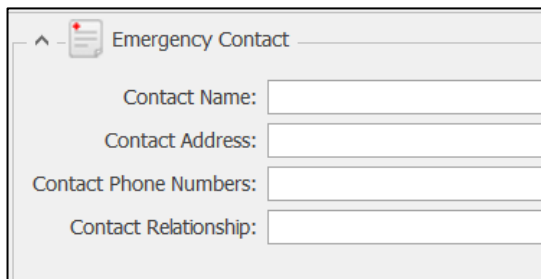
## Referrals, Emergency Contact Information, and Attachments Tabs

The last three tabs of client information are Referrals, Emergency Contact Information and Attachments.

A screenshot of the 'Referral Information' form. It includes a header with a person icon and the text 'Referral Information'. Below the header are three input fields: 'Referral Date:' with the value '8/24/2023', 'Destination:' with the value 'Community mental health', and 'Created By:' with the value 'Breall Baccus'. At the bottom, there is a section for 'Notes' with an upward-pointing arrow.

Referrals allow you to track what types of referrals you provide to survivors and add notes if you'd like. The "Destination" drop down is customizable to your agency.

Emergency Contact Information provides a space to record the emergency contact of the client.

A screenshot of the 'Emergency Contact' form. It includes a header with a document icon and the text 'Emergency Contact'. Below the header are four input fields: 'Contact Name:', 'Contact Address:', 'Contact Phone Numbers:', and 'Contact Relationship:'.

Attachments is where you can attach documents related to the client. Keep in mind that only documents related to the client should be included in the client record. Some documents, such as an HHSC TANF form, but be kept separate from a client file. For more guidance on documentation and retention, please view our [Creating Safer Spaces page](#).

## Creating Household Members

After saving the Main Client you have created, you can add children or household members that will also be receiving services into Osnum. You can do this either by clicking the Household Member tab in the client record or navigating to the top left and clicking New > Household Members.

The Household Member record is almost exactly the same as the Client record. The only difference is that it does not have a Household Member tab, and it includes fields to tie the record to a Main client. Once you select the main client you would like the Household Member tied to and their relationship, and click “Save” the Household Member will appear in the main Client record under the Household Member tab.

The screenshot displays the Osnum software interface for a client record. The 'Primary Details' section includes fields for Client ID (100170), Intake Date, First Name (Kate), Middle Name, Last Name (Smith), and Main Client (Smith, August). The 'Relationship To Main Client' is set to 'Child'. The 'Demographics' section includes Gender (Female), Race (Client refused), Ethnicity, Primary Language Spoken (Cantonese), and Highest Education Completed. The 'Identifiers' section includes ID/TTS Number/Alice ID and Client File Number. The 'Contact Information' section includes County of Residence (Caldwell), Address (1 - 1111 Test Road, ...), Phone Numbers, Geographic Location, Email Address, and Advocate/Case Manager. The 'Other Information' tab is open, showing a table of household members:

Relationship To Main Client	Last Name	First Name
Child	Smith	Bill
Child	Smith	Kate

### Quick Tips

- Household Members can also be thought of anyone who is not the “Head of the Household”. This could include adults who live in the house, such as grandparents. Household Members can have their own victimization or be receiving services because they are indirectly impacted by the Main Clients experiences of abuse. It is up to your agency to decide how clients are entered, either as Main Clients or Household Members, and to stay consistent.
- Services should only be tracked for Household Members if they are directly receiving services. Just because a Main Client has children does not mean that they need their own record in the system.

## Creating a New Offender Record

There are a few ways to navigate to the Offender section of Osnum-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. This screen also allows you to upload a photo of the offender, record information about the offender’s job, note any distinguishing physical features or other details, and identify any additional risk factors. 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 Victimations 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 screenshot displays the 'Offender' record creation interface. It is divided into several sections: 'Primary Details' (Client ID, Intake Date, Name fields, Date of Birth), 'Demographics' (Race, Gender, Ethnicity, Veteran Status, Disability, Substance Abuse), 'Contact Information' (Address, Phone Numbers, Rural checkbox), 'Other Information' (Picture upload area), 'Associated Victimations' (Warning icon), 'Attachments' (Document icon), 'Vehicles' (Car icon), 'Employment, Income and Family' (Employment, Place of Employment, Employment Type, Individual Income), 'Risk Assessment' (checkboxes for location, criminal record, charges, government status, weapons access, gangs, threats, violence, strangulation), and 'Physical Description' (checkboxes for weapons access, gangs, threats, violence, strangulation). A 'Notes/Risks or Other Details' field is also present at the bottom.

### Quick Tip

- Be cautious about the information collected within Osnum about offenders. It should be used for safety reasons only.

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## Hotline Screen

To navigate to the Hotline Screen, click the navigation button and click “Hotline List.” Click New > Hotline. This will open the hotline module, pictured below.

Always fill out the top Call Details section, including Call Type. HHSC is the only funder that is looking for specific Call Types selected. To enter a single hotline call: Fill out the boxes labeled “Individual Calls” and click “Save” at the top of your screen. To enter multiple hotline calls, fill out the Call Details and enter the number of Calls under Bulk Call Entry. To report individual or bulk calls to VOCA, you must also fill in the Victimization Type Field in the Individual Calls section. The rest of the information is optional. You may customize the list of Call Reasons and Referrals Provided to track as needed for your agency.

The screenshot displays the Hotline Screen interface with the following sections:

- Call Details:** Call Start Date: 8/25/2023, 5:11 PM; Call Type: [dropdown]; County: [dropdown]; ZIP Code: 78737.
- Individual Calls:** Call End Date: 8/25/2023, 5:11 PM;  Not Accepted to Shelter,  Accepted to Shelter; Caller Name (if available): [text]; Victimization Type: [dropdown]; Phone Number: [text]; Associated Client: [dropdown]; Number of Children: 0; Referral Source: [dropdown]; Initial Contact: [dropdown]; Created By: Breall Baccus.
- Bulk Call Entry:** Number of Calls: 0.
- Call Notes:** Rich text editor with a toolbar and font settings (Times New Roman).
- Call Reasons:** Table with columns: Add, Remove, Bulk Add, Name.
- Referrals Provided:** Table with columns: Add, Remove, Bulk Add, Name.
- File Attachments:** New, Import From Scanner, Import From Webcam, Attachment table.

### 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.

**Trainings/Presentations/Community Education**

▲ Trainings/Presentations/Community Education

**A**

Education Type:  x

Type of Informational Product:  x

OVAG/SAPCS General Training Subject:  x

HHSC Type:  x

Start On: 4/22/2020

Duration: 30

Start Time: 11:00 AM

End On: 4/22/2020

End Time: 11:30 AM

Number of Sessions: 0

▲ OVAG/SAPCS State:

**B**

Outcome Type:  x Number of Instruments Given: 0

Number Completed: 0

Number Reporting Desired Outcome: 0

▲ Surveys

**H**

Survey Type:  x

Number of Surveys with Completed Resource Outcome: 0

Number of Yes Responses to Resource Outcome: 0

Number of Surveys with Completed Safety Outcome: 0

Number of Yes Responses to Safety Outcome: 0

▲ Topics for Meetings, Presentations or Training **D**

Add Remove Filter All Items Export to

Name

Forms (SAPC)

New

**F**

Staff

Add

**G**

0

**C**

Location Notes

Contact Name:

Agency:

Phone:  ...

Address:  ...

County:  x

▲ File Attachments

New Import From Scanner

Attachment	File...	Cate...
------------	---------	---------

▲ Audience Types **E**

New X Filter All Items Export to

Audience Type	Attendee Count
---------------	----------------

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, fill out the field labeled “HHSC Type” to identify the contract type the training is provided under.

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” to see the list. Hold down ctrl when you click to select more than one. 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.

## Surveys

This page is also where you enter anonymous outcome surveys collected from survivors. When entering survey information, make sure to add the “Start On” date that you’d like the numbers reported within for the funder. OVAG/SAPCS section (B) is where you can collect the OVAG/SAPCS outcome questions. Administrators may want to make sure you create a list of the outcome questions or surveys your agency is required to ask. For HHSC survey questions related to resources and safety, you can fill this information about under (H). All four types required by HHSC are listed in the “Survey Type” dropdown. Again, make sure that the “Start On” field is a date within the month you’d like the survey numbers to pull into the HHSC export.

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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.

The screenshot shows the 'Volunteer Time' interface. At the top left is a clock icon and the title 'Volunteer Time'. Below this are several sections:

- Volunteer:** Includes dropdowns for 'Type' and 'County', checkboxes for 'Direct' and 'HHSC Attributable', and a 'Start On' date field set to 4/22/2020.
- Bulk Volunteer Entry:** Includes a 'Total Number of Hours' spinner (0.00), a 'Group Name' text field, and a 'Number of Volunteers' spinner (0).
- Individual Volunteer:** Includes 'Start Time' (11:30 AM), 'Duration' (30), 'End On' (4/22/2020), 'End Time' (12:00 PM), and 'Mileage' (0) fields.
- Notes:** A large empty text area on the right side.
- Staff:** A toolbar with 'Add', 'Remove', 'Refresh', 'Undo', 'Lock Account', 'Filter' (set to 'All Items'), 'Export to', and 'Print Preview...' buttons. Below the toolbar is a table header with columns: 'Volunteer', 'User Name', 'First Name', and 'Last Name'. The table body is currently empty.





## Lists

The “Lists” section contains five different lists of data available to users in Osnum. 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. Similar to the services worksheet or Persons lists, you can filter, add columns, or edit information for all these lists.

Client	Client ID	Victimization Date	Date Approximate	Offender	Offender Unknown	Offenders...	Youth IPV Status	Victimization Type	Ad
Max, Mad	100087	5/1/2019	<input type="checkbox"/>		<input type="checkbox"/>	Dating Relationship		Domestic Violence	
Trumpet, Alana	100077	2/1/2016	<input type="checkbox"/>		<input type="checkbox"/>			Sexual Assault	
White, Sydney	100132	10/14/2019	<input type="checkbox"/>		<input type="checkbox"/>	Current or Former...		Domestic Violence	Ha
Tiger, Tony	100128	10/23/2019	<input type="checkbox"/>		<input type="checkbox"/>	Dating Relationship		Domestic Violence	Chi
Moon, Saturn	100062	4/1/2015	<input type="checkbox"/>	Vil, Cruella	<input type="checkbox"/>	Current or Former...	No	Sexual Assault	
Clown, Bobo	100051	1/1/2015	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	Other		Hate/Bias Crimes	
Jordon, Donna	100122	10/11/2016	<input type="checkbox"/>		<input type="checkbox"/>		Unknown	Additional Victimiz...	Ars

## Partially-Not Served Clients

Some grants ask you to track survivors who reach out for assistance that your agency is not able to serve either partially or at all. To track these instances, you can use the Partially- Not Served list in Osnum. To navigate to the Partially-Not Served list, click Menu > Lists > Partially-Not Served. Then click New > Partially- Not Served.

StartupView		Partially-Not Served
Provided Service		
Person:	<input type="text"/>	
Date Requested:	8/29/2023	
Status:	Not Served	
Reason:	<input type="text"/>	
Created By:	Breall Baccus	
Notes		

You can connect the entry to a client record in the system, but this is not necessary. Fill in whether the Status is partially served or not served, then select the reason. This list of reasons corresponds with the VAWA grant list of reasons. After entering all the information, click Save.

The screenshot shows the Osnum application interface. On the left, a navigation menu lists various data lists: Person(s), Services Worksheet, Hotline List, Reporting Dashboard, Trainings/Presentations/Community Education, Volunteer Time, Lists, Other, Dashboards, Log Off, and Exit. The 'Lists' folder is expanded, showing a list of records with columns for Start On and Funding Stream. A red arrow points from the 'Lists' folder in the menu to the 'Victimizations' list in the expanded view.

Start On	Funding Stream
30/2023	HHSC
20/2023	HHSC
19/2023	HHSC
19/2023	HHSC
18/2023	HHSC

Below the list, there are several icons representing different data categories: Client Services, Stays, Victimization, Protection Orders, Financial Assistance Records, Case Notes, Surveys, Partially/Not Served, HUD Data Collection, and Task Alerts. At the bottom, the user's name 'User: bbaccus' is visible.

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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.”

The screenshot shows the 'Client' view in a software application. At the top, there is a toolbar with icons for 'New', 'Delete', 'Open Item', 'Refresh', 'Show Report', 'Previous Client', and 'Next Client'. Below the toolbar is a search bar with 'Enter text to search...' and 'Find' and 'Clear' buttons. The main area contains a table with columns: Person ID, Last Name, First Name, Date Of Birth, Age, County, Primary Phone..., Gender, Race, and Ethnicity. A numeric filter is applied to the 'County' column, showing 'From 3' and 'To 102'. A small filter icon is visible on the 'County' column header.

Person ID	Last Name	First Name	Date Of Birth	Age	County	Primary Phone...	Gender	Race	Ethnicity
100135	Sue	Patty	12/1/1990	2				Refused	
100005	Clark	Katie	11/12/1917	10				White	Non-Hispanic
100053	Jemson	Anna	1/1/1985	3				Asian	Black or African American
100134	Minor	Maria	7/16/2003	1				Pacific Islander	
100085	Cole	John	7/4/1988	3				White	Anglo
100119	Canter							Native Hawaiian	
100136	Boop	Betty	12/31/1998	2				White	

The 'Customization: Client' dialog box is open, showing a search bar 'Search for a column...' and a list of fields. The fields are: APS - Current, APS - None, APS - Previous, Client File Number, CPS - Current, and CPS - None. There are 'Add...' and 'Remove' buttons at the bottom.

To filter clients based on multiple criteria, use the “Filters” box at the top of the screen. You can build your own filter by clicking “New” or “Edit” to edit and update filters already created. These can be quite tricky to build, so for assistance please reach out to Osnum Support at [support@osnum.com](mailto:support@osnum.com)

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The 'Filter' dropdown menu is open, showing a list of filter options: Victimization Type, Victimizations, VOCA Services, VOCA Victimization(s), Zipcode/Staff, Edit..., and New... The 'New...' option is highlighted.

## 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. [Appendix A](#) at the end of this document lists all of the reports and their uses within the Texas System. *We highly recommend administrators delete old versions and reports no longer in use to avoid running reports that do not pull in accurate information.* To run 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.

Report Name	Version Date
▶ Report Category: (Count=9)	
▶ Report Category: *Flex Reports - 2021 (Count=13)	
▶ Report Category: Display Reports (Count=19)	
▶ Report Category: Generic Reports (Count=4)	
▶ Report Category: HUD Reporting (Count=3)	
▶ Report Category: OVAG (Count=3)	
▶ Report Category: SAPCS Federal (Count=1)	
Spreadsheet Reports	
New ✖ Favorite Edit Bulk Add Import / Export Reports Refresh	
Name	Version Date
ESG Monthly Performance Report	3/30/2023
▶ VOCA Report	5/6/2022

### Quick Tip

There are two types of reports- “Flex Reports” and what we call “Spreadsheet” or One-Click reports. TCFV has guides on how to use the VOCA and TDHCA ESG One-Click Reports on our Data and Funder Reporting webpage.

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 For more information on reporting, please view our Osnium Training Video Series. Reach out to [datatx@tcfv.org](mailto:datatx@tcfv.org) if you are interested in making sure you have the most up to date reports.

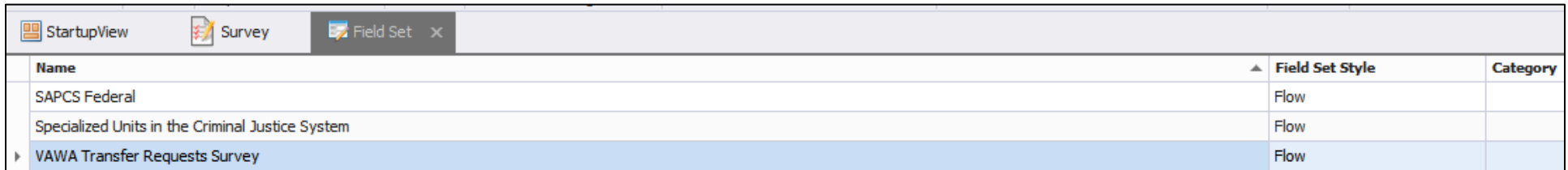
The only report you will not find on this Reporting Dashboard is the HHSC Export. To run the HHSC Export, Click on Tools > Run External Application > HHSC Export. Once you run this report, you can download the CSV files as needed to upload to FVNet. An HHSC Osnium Reporting Guide is available on the [Data and Funder Reporting Webpage](#).

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## Field Set & Survey

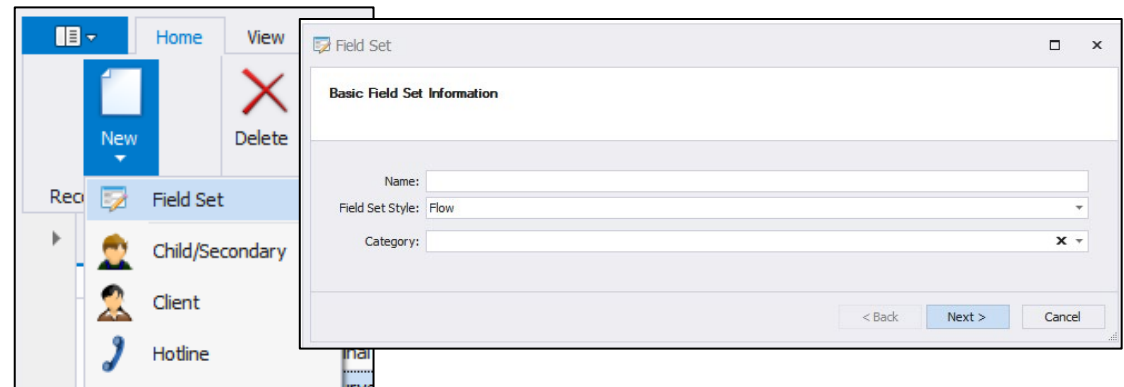
These two sections (Field Set and Survey) work together when users create surveys. To get to the Field Set section, click on the Navigation button on the top left of your screen, then hover over “Other,” then select “Field Set.” To get to the Survey section, click on the Navigation button on the top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



Name	Field Set Style	Category
SAPCS Federal	Flow	
Specialized Units in the Criminal Justice System	Flow	
VAWA Transfer Requests Survey	Flow	

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 [Osnum’s documentation link](#) that walks you through creating a survey with a short video tutorial.



## Conclusion

For more information, or questions you may have regarding the overall system, please refer to the recorded Osnum training webisodes on TCFV’s [Data and Funder Reporting Page](#). Please feel free to reach out to TCFV at [DataTX@tcfv.org](mailto:DataTX@tcfv.org).

Osnum has [helpful documents](#) on their website. You can utilize your support hours and reach out to Osnum’s support staff by emailing [support@osnum.com](mailto:support@osnum.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 Osnum team.

## Appendix A: Reports

Below lists the most up to date reports in Osnum and their uses.

<p><b>Flex Reports:</b> Flex Reports tell you how many clients or services were entered during the selected time frame and are the most commonly used reports in the system. 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.</p>	
<p><b>Important! The most up to date flex reports in the Reporting Dashboard should be under Report Category: *Flex Reports- 2021 (Count =13)</b></p>	
Financial Assistance Flex Report	This report pulls in all financial assistance entries for the selected time frame.
Hotline Flex Report	This report pulls in hotline calls entered for the selected time frame.
Partially- Not Served Flex Report	
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.
Referral Flex Report	This report pulls information entered into the Referrals tab on the client page for the selected time frame.
Services Flex Report	This is the most used report in your system. This report pulls in client and service information for services reported during the selected time frame.
Stay Flex Report	This report pulls in information entered in the stays tab for the selected time frame. It does not pull in HUD information. This will pull in any client who has a stay entry and is still in housing during the time frame.
Stays Flex Report: Admission/Discharge	This report pulls in stays information and allows you to choose if you'd like to only pull in clients who were either admitted during the time frame or exited during the time frame selected. You must choose if you want to run it for admission dates or discharge dates.
Training/Presentation Flex Report	This report pulls information from the Trainings/Presentations/Community Education Page during a selected time frame.
Victimization Flex Report	This report pulls in victimization information for victimizations entered during the time frame selected. <i>This does not look at services, but only victimization by reported date.</i>
Volunteer Time Flex Report	This report pulls in volunteer time entries during the time frame selected.

**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](#)

**HUD Reporting**

HUD COC APR and ESG CAPER- updated at least every two years.	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 Tab.
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HUD CE APR	Used to pull Coordinated Entry information for programs that participate in or receive HUD CoC Coordinated Entry grants.
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**Spreadsheet Reports:** These reports are one-click reports to pull in information related to the specific grant. Click on the report to see specific Osnium instructions for these reports.

<a href="#">Texas ESG Performance Report</a>	This report pulls information for the TDHCA Monthly Performance Report for ESG funding.
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<a href="#">VOCA Report</a>	This report pulls in information for the federal CJD VOCA grant.
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The below reports are no longer being updated and ***should not be used for reporting purposes***. All information for these grant reports should be able to be obtained through flex reports. We recommend deleting these report categories from your system.

- Report Category: (blank)
- Report Category: Generic Reports
- Report Category: OVAG
- Report Category: SAPCS Federal
- Report Category: SAPCS State Report
- Report Category: VAWA Reporting
- Report Category: VOCA Report *\*Note there is a VOCA report up to date in the Spreadsheet Reports Section*
- Report Category: z.Flex Reports

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