A Starters Guide to EZReports
2024-2025

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For specific questions not covered in this FAQ please contact your Resource Center!

How to log into 2024-2025 school year on EZR

Follow this link https://www.ezreports.org/newyork2425/, your username and password have not changed.
• If you are in EZR but the URL does not have 2324 you are in the wrong system year.
New search bar. You can search Action/Report it will direct you to what you are looking for.
• After signing in there is a 'Support' button at the top right of the page, click this button to access online help such as the user guide, FAQs, training videos, and more.

User/Roles/Permissions

What are those roles?
• Grantee Admin
• Grantee User
• Site Admin
• Site User
• Site Sub User
• Grantee Evaluator
• Functions of each role:
• **Grantee Admin:** Full access to the grantee and site level. Manages permissions and access rights for other users within the grantee and site context. (ex. Program Director, Data Manager)
• **Grantee User:** Access to the grantee and site level. Access within specific modules may be limited to "Read-only" or "no access" by the Grantee Admin.
• **Site Admin:** Full access to the site level. Manages site-specific settings and permissions. Module restrictions may be set by the Grantee Admin. (ex. CSD, Site Director)
• **Site User:** Access to the site level. Access within certain modules may be limited to "Read-only" or "no access" by either the Grantee Admin or Site Admin.
• **Site SubUser:** Access to the site level. Access within certain modules may be limited to "Read-only" or "no access" by either the Grantee Admin or Site Admin.
• **Grantee Evaluator:** For the Evaluator that the program has chosen.

Adding Admin/Staff to EZR

When adding admin and staff to EZR the following information is **required**:

Log into EZR on the dashboard, click on the User icon or click on admin on the left side of the screen and then click users.

Adding an Admin Staff:

1. **Click the Add User button.**
2. **Select the appropriate role**
3. **Enter their email address**
4. **Fill out personal information**
5. Set Permission
6. You can give a user Read Only Access, which overrides their role's permissions, limiting them to read-only access for all modules.
7. Click Save to complete the process. The new user can then log in to perform their tasks.

Adding site Staff:

Click on the Staff icon or on the lefthand side of the screen click on Stakeholder the click on Staff. When adding staff to EZR the following information is **required**:

Click ‘Staff’ button on site level, click “add staff” and fill in the required information. Some of the information listed below is optional.
• First and last name
• Their email address
• Personal information - gender, education, ethnicity, race, staff type
• Background checks - fingerprint screening (Yes or No, if yes it will ask for the screening date)
• Work information - start date, funding source (Yes or No), payment mode (cash, in kind, or unknown)
• Work Experience - experience in (# of years or unknown) afterschool programs,

teaching, youth development, community

In EZReports staffing, you can also:

- Assigned sites and sessions
- Professional development hours
- Required documentation
- Status (active, dropped)
- Ability to add, drop, or delete staff
- Export staff information to Excel
- View and upload records for sessions, professional development, and documents

If no one in the organization has Grantee access to add or change users, the Program Director should email emsc21stcclc@nysed.gov to be given access.

Activities/Sessions - Learn how on the EZR user guide

• Activity - An activity is a service or offering that a site provides. Ex: fitness club
• Sessions - Sessions are date/time frames that are scheduled for activities and special

events in the program. Ex: fitness club has a session on Mondays at 3:00 pm and Wednesdays at 4:00 pm.

• Together activities and sessions should create a schedule for your program.

You can add activities and sessions by clicking on the “Activities’ button, then ‘Add Activity’ > ’Regular Activity’. Once an activity is made you can create a session(s) in that activity.

Special events - Learn how on the EZR user guide

When should an activity be made into a special event?

• An activity should be added as a special event when it occurs outside of regularly scheduled program hours.

How can I add adult attendance to events?

• A special event also allows you to add students and adults as participants. You can also count the number of adults (parents/guardians) of students attending to help keep attendance.

Adding a Holiday - Learn more on the EZR user guide

From the dashboard of both the Grantee home and the Site home

1. On the lefthand side of the screen click on Programs the click on Holidays
2. Click add Holiday
3. Fill out the prompts

From Grantee home you can choose the sites that are closed and from the Site level you will only be able to choose the site you are in.

When to mark a holiday in EZR -

- You should mark dates as a holiday if there is a school closing event during regularly scheduled programming.

Example:

- If you have eight weeks of programming from March 1st to April 30th, Monday through Friday, and there is a snow day on March 7th (a Tuesday) preventing programming, mark March 7th as a holiday and note "snow day."
- If you have eight weeks of programming from March 1st to April 30th, Monday through Friday, and there is no school from April 10th-14th for spring break with no programming held, mark that week as a holiday and note "spring break."

• **Note:** If school is not in session and you are not holding programming, mark it as a holiday. If you are holding programming, do not mark it as a holiday.

Upload and Register Students

• **Upload student demographic information:** Large uploads of new students can be uploaded to EZR through the demographics template. You can also add small entries one student at a time.

• **Large uploads:** Click on Upload, Demographics, Download blank data template on the left of the page (student information can be added/updated later in the updated student data template after students are uploaded), input the required fields marked in red, save the template, then upload the template on the demographics page on the right.

NOTE: Please do not make changes to the template or use symbols such as #, - & @ etc. as the template is very sensitive and might send back error reports. Also, if you do not have the student's NYSSIS State ID (Rest of State only) you can use a place holder 008nnnxxxx (8nnn being the grant number, xxxx being a unique # for the student you can assign) and replace it once you have the accurate NYSSIS ID.

• **One-by-one:** In the site you want to add the student to, click the "Students" button on the dashboard, click the yellow button "Add Student" on the left (it will say 'Manually register new students one by one' next to it). Fill in all of the required fields marked with red asterisks, then save and continue to fill out the other pages.

NOTE: If you do not have the student's NYSSIS State ID (Rest of State only) you can use a place holder 008nnnxxxx (8nnn being the grant number, xxxx being a unique # for the student you can assign) and replace it once you have the accurate NYSSIS ID.

• **Register Students:** Once students have been uploaded, go to the dashboard and click on students, click the "Register Student" button, select the students you wish to register in the checkbox column on the left side, and then click "Register Student".

Note: If your upload has errors, you do not understand please create a support ticket under Support in EZR.

Steps to Download Student Data Template:

1. **Select a Template:**
    - **Basic Template (28 fields):** Includes mandatory fields for students with a few optional fields. Does not include fields for parents or other contacts.
    - **Standard Template (45 fields):** Includes all data fields of the Basic template, plus important data fields for one primary parent contact.
    - **Comprehensive Template (102 fields):** Includes all data fields of the Standard template, plus medical data fields for the student, second parent, two emergency contacts, and one additional adult authorized to pick up the student.
    - **Custom Templates:** Currently in development and will be available soon.
2. **Select Data Options:**
    - **Don't include Student Data:** Download a blank template for file format and data upload codes to import new students.
    - **Include Registered Students Only:** Update certain data fields for registered students.
    - **Include All Students:** Update certain data fields for all students.
3. **Download Template:**
    - Click on the Download Template button.