A Starters Guide to EZReports
2023-2024

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

How to log in to the 2023-2024 school year on EZR

Follow this link https://www.ezreports.org/newyork2324/, 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.
- 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 SubUser
- 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 Staff to EZR

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.
- 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

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.

When to mark a holiday in EZR - Learn how on the EZR user guide

- You should mark dates as a holiday if it is a school closing event that occurs during regularly scheduled programming.
- *For example*, You have eight weeks of programming from March 1st to April 30th, Monday through Friday. March 7th, a Tuesday, there is a snow day and you can't hold

regularly scheduled programming for that day. You would put a holiday in EZR for March 7th and write snow day.
Or
- You have eight weeks of programming from March 1st to April 30th, Monday through Friday. April 10th-14th is spring break and school is not held that week, and there will not be any programming held, you would put in that time frame for a holiday and label it spring break.
- **NOTE:** If school is not in session and you are not holding programming, put in the holiday. If school is not in session and you are holding programming, **do not** put in 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".

Enrollment and attendance methods

- **Program Attendance:** If you pick this, you add students yourself and attendance is counted automatically for the whole program that day.
- **Activity Attendance:** Add students manually or let the system add them if they match the selected grade levels. Program staff take attendance for each session.

On the "Record Attendance" page, sessions are split into sections for these two modes.

For Activity Attendance, enroll students by:
- **Add Students One by One:** Click "Enroll" next to a name to add students to a session. This generates an enrollment date.

- **Add a Bunch:** Check the boxes next to names, add the date, and hit "Enroll" at the bottom.

You can see how many are enrolled at the top and also manage dates in the "Enrollment Dates" part.
If you're copying sign-ups from another session:
- Click "Copy Enrollment."
- Pick the session you're copying from.
- See the names and dates and click "Enroll."

To remove someone from a session:

Click the "Disenroll" tab.

Take them out one by one by clicking "Disenroll" or take out many by checking boxes and hitting "Disenroll."
If a student was enrolled before, they can be re-enrolled.

Remember, you can't disenroll students if there's already attendance recorded. Also, if you're removing a student from a session, the date must be after the last time they attended that session.
Attendance - Sign in/ sign out

Recording Standard Attendance

- **Navigate to the Screen:** Go to 'Attendance > Record Attendance' at the Site Level.
- **Select a Date:** Choose the date for entering attendance, and you'll see scheduled sessions for the day.
- **Choose a Session:** (Multiple methods) Method 1) Click 'Record Att' for the session you want. If there are 100 or more students, you can use the Student Search tool. Select students who attended, and adjust check-in and check-out times using the time picker. Then save. Method 2) click 'check in', select students (adjust time as needed) and click check in at the bottom of the page. When the session is over, click the checkout tab, select students and click 'check out' at the bottom of the page. Method 3) ID scan. This method would only be utilized if using ID scanners for your program.
- **Live Attendance Link:** If real-time attendance was recorded, you'll see a 'Live Att' link. You can use this to update or remove attendance.
- **View Attendee Details:** Use the 'Attendee(s)' button on the Record Attendance screen to see details about who attended.

Recording Attendance with Student Search (For Large Sessions)
If a session has 100 or more enrolled students, you can record attendance using a student search tool.
- **Click 'Record Att':** A popup appears with two options.
- **Select 'Using Student Search':** You can choose to always use this method by saving it. Change it later by clicking the icon next to the session name on the Record Attendance screen.
- **Search for Students:** Look up students by Name or Student ID.
- **Edit Times:** Click on the 'In' and 'Out' times (or 'Duration' for asynchronous sessions) to record attendance.
- **Save:** Click on 'Save' after recording the attendance.

Review & Certify Attendance

- **Access Review Screen:** in the left-hand sidebar click on 'Attendance > Review and Submit' to see that month's attendance.
- **What You Can Do on This Screen:**
- Review and certify attendance for each date.
- See attendee counts for programs by date.
- Look at attendance by session with 'Att by Session'.
- Review attendance by grade level.
- See the total count of students who haven't checked out.
- **Certifying Attendance:** Before submitting, you must complete attendance for all scheduled session dates within the month from the 'Review Attendance' screen. Click on the month you want to submit for, then click on the days/select all and click certify at the bottom of the page. The column for 'Att by Session' should have two matching numbers, if not click on the numbers to see what is missing before certifying.
- **Submitting Attendance:** After reviewing and certifying, you'll go back to the 'Review and Submit' screen to finish submitting attendance. On the far right column 'Action', click 'Submit Attendance' for the month you want to Submit. If there is an error a pop-up screen will appear and you can go back in to make corrections.
- **Explanation of Fields:**
- **'Attendance by Session' (Att by Session):** This link shows recorded session attendance. Click it to see participant numbers, last update times, and who updated it last. Sessions with no enrollment are marked 'No Enrollment.' To certify, attendees must be enrolled. If there's enrollment but no marked attendance, use the 'Attendees' button to confirm. There's also a 'Confirm "No Attendees" for # Sessions' button to confirm no attendance for enrolled but unrecorded sessions.
- **'Review':** This field has a 'By Grade' link to show student attendance by grade. There's also a 'By Group' link if 'Group Enrollment' is enabled, showing attendance counts for each group.

Q&A from Summer 2023 EZR training sessions

- 1. **How do I log in for the 2023-2024 school year on EZR?**
- To log in for the new school year, visit this link: https://www.ezreports.org/newyork2324/. Use your existing username and password. If the URL doesn't have "2324," you're in the wrong system year. If you do not have a username and password reach out to your Program Director who has administrative access to make your account. If you are the Program Director reach out to your Recourse Center.
- 2. **What are the different user roles and their functions?**
- There are different roles in EZReports: Grantee Admin, Grantee User, Site Admin, Site User, Site SubUser, and Grantee Evaluator. Each has specific functions. For example, a Grantee Admin manages permissions, while a Site Admin manages site settings.
- 3. **How can I add staff to EZR?**
- To add staff, provide their name, email, personal information, background checks, work details, and experience. This helps keep track of staff records.
- 4. **How do I add activities and sessions to create a program schedule?**
- An activity is a type of service your site offers. Sessions are the individual classes for each activity. Together, they make your program's schedule.
- 5. **How do I upload and register students on EZR?**
- For student uploads, use the demographics template. After inputting the required details, upload it to the demographics page. Once uploaded, go to the site level, click on students, and register them by selecting and clicking "Register Student."
- 6. **What's the difference between Program Attendance and Activity Attendance?**
- With Program Attendance, attendance is automatically marked for the entire program. With Activity Attendance, attendance is marked for each session individually.
- 7. **How can I enroll students in sessions using Activity Attendance?**
- You can enroll students individually by clicking "Enroll" next to their names. Alternatively, you can select multiple students and enroll them together by choosing the session and date.
- 8. **How can I copy enrollment information from one session to another?**
- To copy enrollment, click "Copy Enrollment," choose the source session, review names and dates, and then click "Enroll" to confirm.
- 9. **How can I record attendance using sign-in sheets for Activity Attendance?**
- Go to Attendance > Record Attendance at the Site Level. Pick the date and session, then note the check-in and check-out times.
- 10. **How can I set up attendance options for my site?**
- Go to Setup > Options at the Site Level. Choose between Activity Attendance and Program Attendance. (Refer to question 7.)
- 11. **When should I mark a special event in EZR?**
- Mark an activity as a special event when it occurs outside regular program hours. You can add both students and adults as participants in special events.
- 12. **How do I mark a holiday in EZR?**

- If school is not in session and you are not holding programming, put in the holiday. If school is not in session and you are holding programming, **do not** put in a holiday.