

**Need Help?**  
<https://help.geteduca.com>

# Step by Step Guide to Setting Up Educa

Learning Stories, assessment and community - in one place



## Set Up

Invite teachers, get site ready to invite families

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## Invite Families

Document and share learning in real time

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## Explore

Plans, forms, teacher portfolios, reports, more



# 1

## Set Up (invite teachers, get site ready for parents)

### Before you start

Access Educa online (best with Chrome) on desktop, iPad or a phone browser. Parents typically use our free Educa Touch Android or iOS (Apple) apps.

- “Admins” have full rights. The person who starts the trial can give admin rights to others.
- Educators need individual emails.

### 1. Log in to Educa

Click “Activate” in the email from Educa support to [activate your account](#).

### 2. Invite teachers

[Invite a teacher](#) or two to help you explore Educa.

### 3. Add children

[Add children one-by-one](#) or send a list to Educa support and we will upload for you. [This article](#) explains.

### 4. Set up Classes and Groups

Each child belongs to a [class](#). Use “Groups” to segment children, parents or teachers into groups you can directly communicate with, e.g., by attendance days, teacher discussion groups. [More on Groups here](#)

### 5. Activate frameworks to link to

Go to the Framework library (under Tools) to activate for story and plan linking. Most public frameworks are preloaded. Or create your own. [More here](#)

### 6. Class privacy

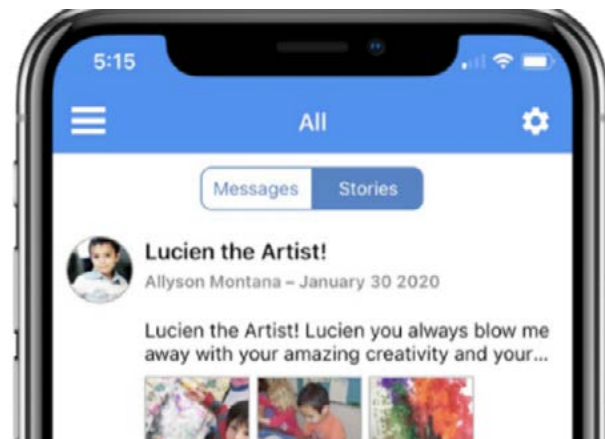
Do you want all teachers to see all children or would you prefer to turn on “class privacy?” [More here](#)

### 7. Add your logo, Policies & Resources

Add info on your service and your logo in About Us. Add policies & resources - for teachers and/or parents.

### 8. Final preparation for parents

Review the other site setting. Use the **Start Checklist** in Forms. **Idea:** Try adding a [group story](#) for parents to see when they first log in to their child’s portfolio.



Here’s a [start checklist](#) that you can:  
-- print out  
-- use to assign tasks to others  
-- check off tasks as you complete them

Share our [parent guide](#) or this [video to help parents](#).

### Why Educa?

Educa makes learning and teaching visible in a way that is engaging for families and personal for educators.

[Register here](#) for a Free Educa Workshop!

Now let’s invite parents!



# 2

## Invite Families, Start Sharing

Your site is ready. Now it's time to invite parents to their child's profile.

### 1. Invite parents (extended family and others)

Invite all parents or just a few until your teachers are comfortable. Here's a [pitch/invite](#) to send parents. Mass [invite](#) parents - Manage Users in Center Info.

Parents can then invite others to be part of their child's profile to receive story posts as well, e.g., extended family, the child's clinician.

### 2. Do you need parent consents?

Your service agreement probably covers privacy issues, e.g., sharing playground photos seen by other parents. If not, here is a [parent consent form](#).

### 3. Learning Stories & sharing

A Learning Story is how you record and share a child's learning and your teaching. Link to frameworks and plans to provide context for parents.

Parents get push notifications of new stories. Ask questions to start a conversation. Parents can also continue "parent stories" to their child's portfolio.

### 4. Child Profile

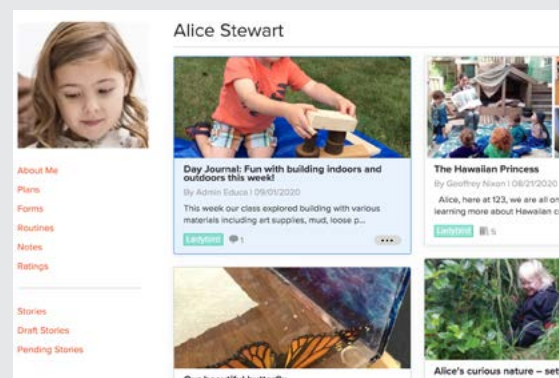
The heart of Educa is the child profile. In addition to stories, it's where to find [plans](#) and [forms](#) (also under Tools). Also communicate with parents in [Notes](#).

### 5. Message Board

Adapt the default message to welcome parents. Share announcements and service news.

### 6. Work with your team

- Private conversations in teacher messages.
- Use [story approval](#) to manage and mentor younger teachers.
- Work together on plans and forms.



### Are parents asking if Educa is safe?

Educa is secure. It is password protected and uses the latest in encryption and other security measures to create a safe and secure environment for your community.

There are also internal privacy settings. Read about them [here](#).

Here is [language](#) on privacy you can add to your website, and Educa [log in icons](#) to make it easier for families to log in.

To find out what happens to children's data when they leave, [click here](#).

### Announcing Educa to families

Get off to a good start. Create a positive and collaborative relationship with families.

1. Share your reasons for implementing Educa and the benefits for them and their children.
2. Let them know what to expect, how you plan on using Educa,



# 3

## Explore

Educa is a fully-featured educational platform -- plans, forms, reports, DRDP ratings, teacher portfolios and more.

### Plans

Create individual goals for a child or group or make lesson plans. Create your own template or use ours. [More here](#)

### Reports

- The parent engagement [reports](#) give you an idea of how well you are connecting with parents. You can drill down and see who is active, and who is not.
- Child progress reports give you a graphical picture of how a child is progressing versus framework goals.
- Reports can be downloaded.

### Forms - for everything

[Forms](#) for children, e.g., assessments, and parents, e.g., family info, permission slips, progress reports. For teachers, e.g., evaluations, personal development plans. And for your service, e.g., strategic plans, quality reviews, hazard lists.

### Ratings (for North America only)

[Ratings](#) are used for assessment based on the ELOF and DRDP. Stories auto-populate and observations can be inserted manually. It includes data export and parent reports.

### Teacher portfolios

A private [portfolio](#) for each teacher to log professional development -- an online resume for storing documents, reflective practice, inquiry and evidence of achievement.

### Best practice In Educa

Educa embodies best practice having been built to meet the needs of early childhood leaders worldwide.

Our Help Resources include tips on a range of solutions and activities, e.g., [checking for bias](#).

If you need assistance,  
please call or contact us in Educa.  
We are here to help.



### Keep updated

[Like us on Facebook](#) to get regular tips and inspiration from experts.

Ask to join our [private Facebook user group here](#) to join discussions on new features or to get help from other users.

And don't forget our ECE [webinars](#) by early childhood thought leaders from around the world.

