

Student Pulse Onboarding Checklist (Manual Onboarding)



School/Organisation			
Name		Date	

Complete this checklist if your school imports school data into Student Pulse using spreadsheets. If your school uses Wonde, please use [Student Pulse Onboarding Checklist \(Wonde\)](#). If a checklist item doesn't apply at your school, select **N/A**.

1. Complete the technical setup

NOTE: You can book a meeting with your Pulse Technical Account Manager on [this link](#) (Australia only) or email help@linewize.io (all other regions) for help with completing this section.

#	Action	Description	Done*	Notes
1.1	Check the email from Pulse for early onboarding.	Pulse will email the person who will complete the data sharing for Student Pulse. Contact your TAM if they haven't received this email.	<input type="checkbox"/> Done <input type="checkbox"/> N/A	
1.2	Create the school data spreadsheets.	Create your student and staff spreadsheets. (Optional) Create your teaching staff spreadsheet.	<input type="checkbox"/> Done <input type="checkbox"/> N/A	

Student Pulse Onboarding Checklist (Manual Onboarding)

#	Action	Description	Done*	Notes
1.3	Upload school data.	The responsible person for data sharing uploads the spreadsheets into Pulse.	<input type="checkbox"/> Done <input type="checkbox"/> N/A	
1.4	Configure Student Pulse.	The nominated staff member configures Student Pulse for the school (video) and: <ul style="list-style-type: none"> • Enrols students • Sets up the school structure • Builds the Wellbeing team • Configures term dates • Sets up launch details and check-in schedules 	<input type="checkbox"/> Done <input type="checkbox"/> N/A	

2. Engage staff

#	Action	Description	Done*	Notes
2.1	Schedule regular meetings with staff.	The school schedules: <ul style="list-style-type: none"> • An onboarding/orientation session for the school year • Meetings for the school year to discuss the data from Pulse Insights. We recommend at least two meetings per term. 	<input type="checkbox"/> Done <input type="checkbox"/> N/A	

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#	Action	Description	Done*	Notes
2.2	Facilitate the onboarding meeting	<p>Facilitate the onboarding session using the Pulse Onboarding and Engagement Guide.</p> <ul style="list-style-type: none"> ● Share the Pulse introduction video with new staff. ● Ensure all enrolled staff can sign in to Student Pulse successfully. ● Show how to interpret Pulse’s Wellbeing data. ● Inform the staff how you intend to use Pulse data in your school, e.g. that they will build action plans based on check-in data and student feedback. ● Share the How to Use Pulse guide for Teachers. <p>Check Pulse’s Bite-Sized Learning page for more resources.</p>	<input type="checkbox"/> Done <input type="checkbox"/> N/A	

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#	Action	Description	Done*	Notes
2.3	Discuss with staff how Pulse works.	<ul style="list-style-type: none"> Explain how the Wellbeing section (article, video) of the dashboard works. Show how to use the Help Inbox (article, video). Describe how the dashboard's Experience section works (article, video). Describe how the staff can send and receive Gratitude (article, video). Explain how the staff can use the Resources section when working with Pulse data and engaging students. <p>Check Pulse's Bite-Sized Learning page for more resources.</p>	<input type="checkbox"/> Done <input type="checkbox"/> N/A	
2.4	Share relevant guides.	Share: <ul style="list-style-type: none"> How to access the school's Pulse link. Best Practice guides on the Pulse Help Centre. 	<input type="checkbox"/> Done <input type="checkbox"/> N/A	

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3. Introduce Pulse to parents and guardians

#	Action	Description	Done*	Notes
3.1	Introduce Pulse to your school community.	Share with your school community that you will be using Pulse in the upcoming year. You can use our notification template , along with our Parent and Guardian FAQ .	<input type="checkbox"/> Done <input type="checkbox"/> N/A	

4. Introduce Pulse to students

#	Action	Description	Done*	Notes
4.1	Introduce Pulse to students.	<ul style="list-style-type: none"> Show the introductory video, followed by a group discussion (discussion prompts appear at 3:49). Work through the recommended classroom activities. 	<input type="checkbox"/> Done <input type="checkbox"/> N/A	
4.2	Demonstrate the check-in process.	Show the students how to check in .	<input type="checkbox"/> Done <input type="checkbox"/> N/A	
4.3	Demonstrate how to ask for help during check-in.	Show how students can seek help from a trusted adult at school when they check in.	<input type="checkbox"/> Done <input type="checkbox"/> N/A	

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Additional information

Enter additional notes, reminders, or resources to help you complete this checklist.