

Staff Pulse End-of-Year Checklist



School/Organisation

Name Date

*Select **N/A** (Not Applicable) if a checklist item doesn't apply.

#	Action	Description	Done*	Notes
1	Schedule a data review meeting with your Pulse Account Manager	Review the data from the past year and build an Action Plan.	<input type="checkbox"/> Done <input type="checkbox"/> N/A	
2	Share insights from the year with your school community	Download and fill out the Pulse Wellbeing Insights template.	<input type="checkbox"/> Done <input type="checkbox"/> N/A	
3	Assign the person responsible for the onboarding process.	Open the email asking for the person responsible for next school year's onboarding process and enter their details into Pulse. See the Rollover Process for the steps. Contact your Technical Account Manager (TAM) if you haven't received this email.	<input type="checkbox"/> Done <input type="checkbox"/> N/A	

Additional information: