

Student Pulse Onboarding Checklist



School:	<input type="text"/>		
Name:	<input type="text"/>	Date:	<input type="text"/>

Note: Complete this checklist if your school manually imports school data into Student Pulse using **spreadsheets**. If your school syncs your school data with Pulse via **Wonde**, use [this checklist](#).

Tasks to be completed at the END of the current academic year

This section is for **returning schools**. If a checklist item doesn't apply to your school, select **Not required**.

#	Action	Description	Done	Not Required	Notes
1	Schedule a data review meeting with your Leadership team and action key findings.	Download and use the Data Review and Action Plan to start the review process.			
2	Share insights and gratitude from the year with your school community.	You can use the Linewize Pulse Wellbeing Insights template.			
3	Assign the person responsible for the onboarding process.	Check the email sent by Pulse, requesting you to assign the person who will be responsible for the onboarding process in the next			

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#	Action	Description	Done	Not Required	Notes
		<p>academic year, their details will need to be entered into Pulse.</p> <p>Contact your TAM if you haven't received this email.</p>			

Tasks to be completed at the START of the new academic year

This section is for **new** and **returning** schools. If a checklist item doesn't apply at your school, select **Not Required**.

#	Action	Description	Done	Not Required	Notes
<p>Technical setup</p> <p>IMPORTANT: Complete all technical steps with the help of the Pulse Technical Account Manager (TAM) if you need assistance. If you are yet to complete your technical setup, please reach out to help@linewize.io or book your meeting directly via this link.</p>					
1	Check the email from Pulse for early onboarding.	<p>Pulse will email the person nominated to complete 'data shaping' in Student Pulse when onboarding opens for the year.</p> <p>Contact your TAM if your school's data shaper hasn't received this email.</p>			

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#	Action	Description	Done	Not Required	Notes
2	Create the school data spreadsheets.	<p>Create your student and staff spreadsheets.</p> <p>(Optional) Create your teaching staff spreadsheet.</p>			
3	Upload school data.	Work with your Pulse Coordinator or your school's IT support to upload the spreadsheets into Pulse (article , video).			
4	Configure Student Pulse.	<p>Work with your Pulse Coordinator to configure Student Pulse for your school (article, video).</p> <p>See the steps for enrolling your students, setting up your school structure, and building your Wellbeing team.</p>			
5	Set your Pulse dates and times.	Set your Pulse launch date , term dates , and check-in schedule .			
Re-engage staff					
6	Schedule regular meetings with staff.	<p>Use the agenda items as a guide for discussing the data collected for Pulse Insights.</p> <p>We recommend a minimum of two meetings per term.</p>			

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#	Action	Description	Done	Not Required	Notes
7	Discuss Student Pulse with Staff.	<p>Facilitate staff meetings using the Pulse Onboarding & Engagement Guide.</p> <p>Share the Pulse introduction video with new staff.</p> <p>Ensure all enrolled staff can sign in to Student Pulse successfully.</p>			
8	Discuss with staff how Pulse works.	<p>Explain how the Wellbeing section (article, video) of the Student Pulse dashboard works.</p> <p>Show how to use the Help Inbox (article, video).</p> <p>Describe how the Experience section (article, video) of the dashboard works, and how the school can engage with Gratitude (article, video).</p> <p>Explain how staff can use the Resources section to act on Pulse data and help engage students.</p>			
9	Share relevant guides.	Share the How to Use Pulse guide for Teachers.			

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#	Action	Description	Done	Not Required	Notes
Introduce Pulse to students					
10	Introduce Pulse to students	Show the introductory video , followed by a group discussion (discussion prompts appear at 3:49). Work through the recommended classroom activities .			
11	Demonstrate the check-in process	Show the students how to check in .			
12	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.			
Introduce Pulse to parents and guardians					
13	Introduce Pulse to parents and guardians	Show the introductory video and/or share this FAQ for parents and guardians. Refer to our guide for engaging parents and students about Student Pulse , which includes the communication template and consent forms.			

Additional information

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