

Staff Pulse Onboarding Checklist



School/District:			
Name:		Date:	

Tasks to be completed at the END of the academic year

*Mark the action as **Not Required** if a checklist item is not used or applicable at your school.

#	What	Details	Done	Not Required*	Notes
1	Schedule a data review meeting with your Linewize Account Manager	You can use the Data Review and Action Plan to start the review process.			
2	Share insights 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.	<p>Pulse will send an email asking for the person responsible for the onboarding process in the next academic year. Enter their details into Pulse.</p> <p>Contact your Technical Account Manager (TAM) if you haven't received this email.</p>			

Staff Pulse Onboarding Checklist



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

*Mark the action as **Not Required** if a checklist item is not used or applicable at your school.

#	What	Details	Done	Not Required*	Notes
Technical setup					
Note: Book a meeting with your Technical Account Manager if you need help completing the tasks in this section. You can email help@linewize.io or book your meeting via this link .					
1	Import school data.	Work with your school's IT Contact/Team to import school data into Pulse.			
2	Create staff spreadsheets.	The spreadsheet should include all staff within the school who will be using Staff Pulse.			
3	Upload staff spreadsheets.	Pulse will validate your spreadsheet and show you the list of staff you've added.			
4	Configure Staff Pulse.	Use your current configuration or make changes.			
5	Set up your school structure.	Review the school structure. The school structure is based on the staff groups in the uploaded spreadsheet.			

Staff Pulse Onboarding Checklist



#	What	Details	Done	Not Required*	Notes
6	Set up the Wellbeing team.	Assign Wellbeing staff to the relevant groups where they should have wellbeing oversight.			
7	Set up your Pulse dates.	Set the launch date, term dates, and check-in time.			
Re-engage staff					
8	Schedule regular meetings with staff.	Schedule regular agenda items to discuss Pulse insights. The recommended cadence is two 10-minute sessions each term.			
9	Introduce Pulse to staff.	Share the Staff Pulse help guides: <ul style="list-style-type: none"> For participants: Staff Pulse Check-in For wellbeing oversight staff: Staff Pulse Dashboard 			

Additional information