

Organisation: _____ Date: _____

Name: _____

Tasks to be completed at the END of current academic year

#	Action	Navigation	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			

Additional information:

Tasks to be completed at the START of new academic year

#	Action	Description	Done	Not Required	Notes
Technical Setup					
1	Book meeting with your Pulse Account Manager.	Book a meeting for early January if you need help with completing the below tasks.			
2	Import school data	Work with the IT Contact/Team to import school data into Pulse.			
2a	Create spreadsheets	Create your staff spreadsheets for uploading into Pulse.			
2b	Upload your spreadsheets	Upload your staff spreadsheets into Pulse			
3	Configure Staff Pulse	Work with the Wellbeing Contact (Pulse Coordinator) to configure Pulse for your school.			

#	Action	Description	Done	Not Required	Notes
Technical Setup					
3a	Set up your school structure	Structure will be presented based on your staff groups.			
3c	Set up the Wellbeing team	Assign Wellbeing staff to the relevant group/s where they should have wellbeing oversight.			
3d	Set up your Pulse dates	Set your launch date, term dates, and check-in time.			
Re-engage staff with Pulse					
4	Schedule regular meetings with staff.	Schedule regular agenda item to discuss Pulse insights (10 minutes, twice each term)			
5	Introduce Pulse to staff.	Show the Staff Pulse introductory video in staff meeting, followed by group discussion.			

Additional information: