

Managers Guidance for Wellbeing Checklist

Please follow these steps to make sure that your team members' responses to the Wellbeing Checklist remain confidential. Only you as manager and the individual will be able to view responses.

The form is being shared with you as a template. When you share a form as a template, only the structure of the form is duplicated. No existing response data is carried over to the new form when someone else duplicates it.

If you are not logged in to Microsoft Office you will be prompted to log in.

To be able to use the form you need to duplicate the template. A copy will be automatically saved in your own MS Forms library.

1. The first step is to duplicate the form you will need to open the [link](#) provided and click **'duplicate it'** at the top or bottom of the form. If you do not see this, please contact the person who shared it with you for the correct link.

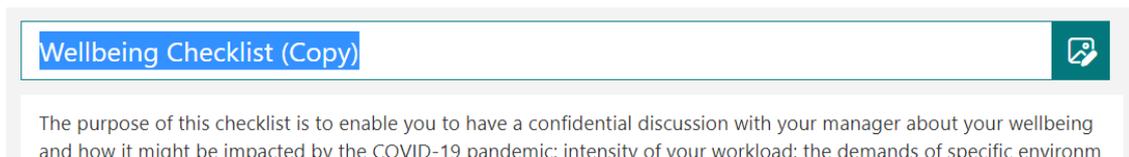


Duplicate this form to use as your own.

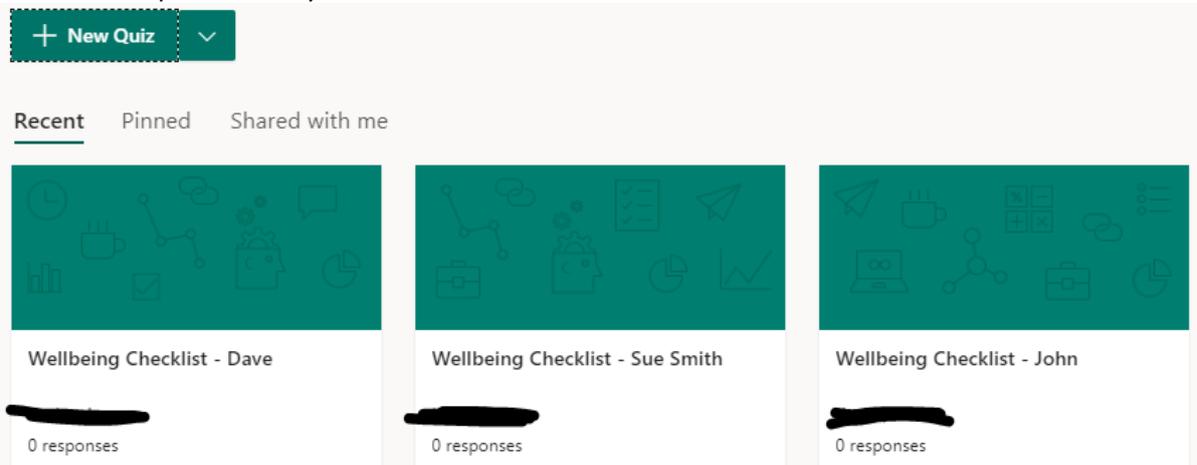
Duplicate it



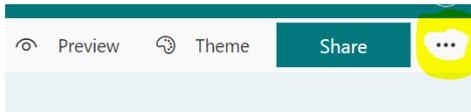
To delete the 'Copy' word from the title, click on the title and delete. You can also add individuals' names in the title, this will make finding it in your forms library much easier.



Examples in library:



2. The second step is to ensure the settings are correct. In the top right corner go to 'settings (...)' and make sure the following are selected:



In the 'Who can fill this form' field select:

- Specific people in my organisation can respond
- ✓ Record name

In the 'Options for responses' field select:

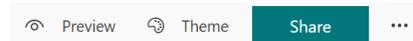
- ✓ Accept responses

In the 'Response receipts' field select:

- ✓ Allow receipt of responses after submission

Please note, this step is very important - if you leave this setting unchecked the individual will not receive a copy of their own responses.

- ✓ Get email notification of each response



Settings

Who can fill in this form

- Anyone can respond
- Only people in my organisation can respond
- Specific people in my organisation can respond
 - Record name
 - One response per person

Options for responses

- Accept responses
- Start date
- End date
- Shuffle questions
- Show progress bar
- Customise thank you message

Response receipts

- Allow receipt of responses after submission
- Get email notification of each response

3. The next step is to send the form to your team member.

Click 'Share' in the top right corner.

In 'Send and collect responses' select:

- Specific people in my organisation can respond
- Then enter the name of the individual who will complete the form
- To send the form click on the email button and that will take you to Outlook. Microsoft Forms includes a brief note in the email body and a link to your form. You can customize the email message as you like.
- Or you can just click 'Copy' and then send the link via email or teams to the individual.



Send and collect responses

Specific people in my organisation can respond

Enter a name, group, or email address

<https://forms.office.com/Pages/Respon>

Copy

Shorten URL



~~Share as a template~~

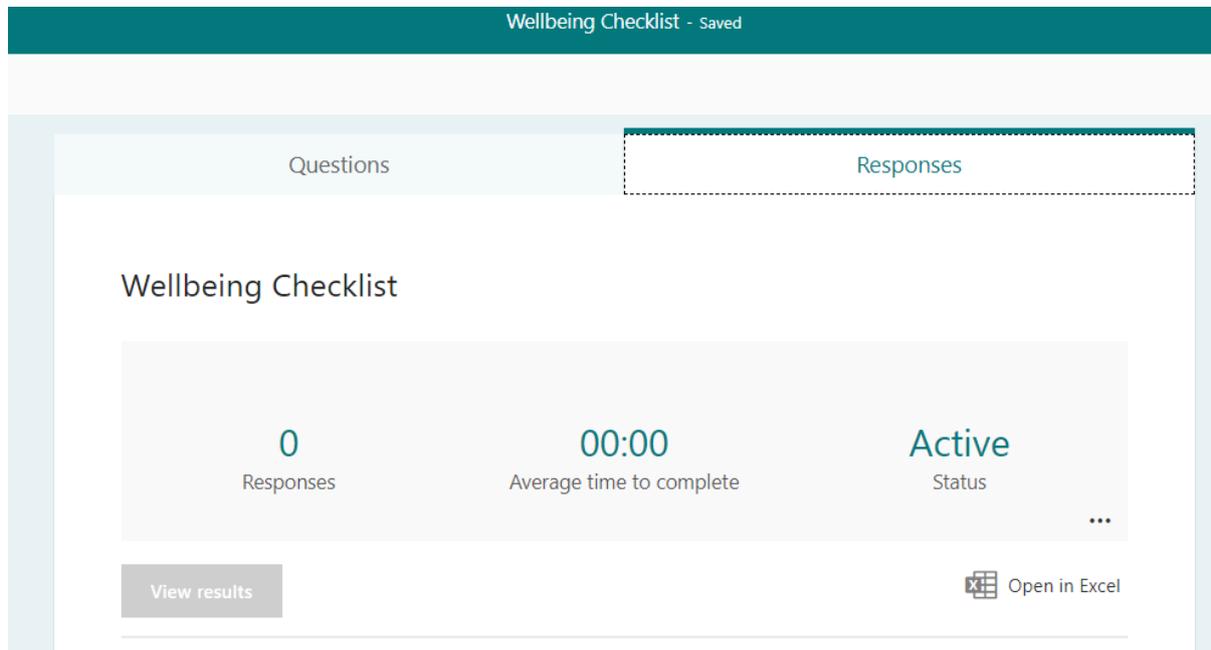
~~+ Get a link to duplicate~~

~~Share to collaborate~~

~~+ Get a link to view and edit~~

Please note, you will need to repeat steps 1-3 for all team members to create individual forms for everyone.

4. The final step is to view your response(s). Once the individual has submitted their responses, you will receive an email notification and you will be able to view their answers on the 'Responses' tab.



Please note, if you wish to share the form with other managers, please ensure that you share it as a template. Responses will be visible to others if you use the other two share options.