Workplace Health Solutions
Center for Workplace Health Research & Evaluation

Workplace Health Achievement Index
User Guide for Enrolling and Completing Sections 1 and 2
# Table of Contents

**Workplace Health Achievement Index**

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workplace Health Achievement Index</td>
<td>4</td>
</tr>
<tr>
<td>Introduction</td>
<td>4</td>
</tr>
<tr>
<td><strong>Enrolling in the Index</strong></td>
<td>5</td>
</tr>
<tr>
<td>Accessing the Index Admin Portal</td>
<td>5</td>
</tr>
<tr>
<td>Sign Up</td>
<td>6</td>
</tr>
<tr>
<td>Signing In</td>
<td>9</td>
</tr>
<tr>
<td>Password Reset Process</td>
<td>9</td>
</tr>
<tr>
<td>Password Update Process</td>
<td>11</td>
</tr>
<tr>
<td><strong>Section 1: Organization &amp; Demographic Information</strong></td>
<td>13</td>
</tr>
<tr>
<td>ORGANIZATION</td>
<td>13</td>
</tr>
<tr>
<td>DEMOGRAPHICS</td>
<td>18</td>
</tr>
<tr>
<td>WORKSITE HEALTH PROMOTION PROGRAM ELEMENTS</td>
<td>24</td>
</tr>
<tr>
<td>USE OF INCENTIVES</td>
<td>26</td>
</tr>
<tr>
<td>PERSON(S) COMPLETING THE INDEX</td>
<td>29</td>
</tr>
<tr>
<td>How to Print a Copy of Responses to Section 1</td>
<td>31</td>
</tr>
<tr>
<td><strong>Section 2: Structure &amp; Process Measures</strong></td>
<td>32</td>
</tr>
<tr>
<td>LEADERSHIP</td>
<td>32</td>
</tr>
<tr>
<td>ORGANIZATIONAL POLICIES &amp; ENVIRONMENT</td>
<td>34</td>
</tr>
<tr>
<td>COMMUNICATIONS</td>
<td>40</td>
</tr>
<tr>
<td>PROGRAMS</td>
<td>43</td>
</tr>
<tr>
<td>ENGAGEMENT</td>
<td>48</td>
</tr>
<tr>
<td>PARTNERSHIPS</td>
<td>51</td>
</tr>
<tr>
<td>REPORTING OUTCOMES</td>
<td>53</td>
</tr>
<tr>
<td>How to Print a Copy of Answers to Section 2</td>
<td>56</td>
</tr>
<tr>
<td><strong>Reviewing Answers to Section 2</strong></td>
<td>57</td>
</tr>
<tr>
<td>Confirming That Section 2 Has Been Completed</td>
<td>57</td>
</tr>
<tr>
<td>Incomplete Section 2</td>
<td>58</td>
</tr>
<tr>
<td><strong>Additional Key Information</strong></td>
<td>60</td>
</tr>
<tr>
<td>Section 3: Performance Measures</td>
<td>60</td>
</tr>
</tbody>
</table>
Annual Cutoff Date for Completing the Index ................................................................. 60
Scoring ......................................................................................................................... 61
Recognitions ................................................................................................................ 63

Index Dashboard .......................................................................................................... 64

INTERPRETING SCORES ............................................................................................. 66
- TOTAL INDEX SCORE ................................................................................................. 66
- LEADERSHIP .............................................................................................................. 66
- ORGANIZATIONAL POLICIES & ENVIRONMENT ..................................................... 67
- COMMUNICATIONS .................................................................................................. 67
- PROGRAMS ................................................................................................................. 68
- ENGAGEMENT ........................................................................................................... 68
- PARTNERSHIPS ......................................................................................................... 69
- REPORTING OUTCOMES ......................................................................................... 69

Downloading a PDF ......................................................................................................... 70
Workplace Health Achievement Index

Introduction

The AHA Index is a voluntary, online organizational assessment that measures both the comprehensiveness of your workplace culture of health and the health of your workforce. There are three parts to the Index:

This User Guide will provide step-by-step instructions on Sections One and Two. For information on how to complete Section Three, refer to the document, Choosing a Method for Submitting Employee Health Data for the three Index Performance Measures.
Enrolling in the Index

Accessing the Index Admin Portal

To set up an Index Admin account, access the Index Admin Portal from the Workplace Health Solutions website and click on the “Get Started” button (refer to arrow).

Once you click on the “Get Started” button, you will be presented with AHA’s terms and conditions. We encourage you to take the time to review them. Upon accepting the terms and conditions by clicking the “I agree” button, you will be directed to the Index Sign Up page.
## Sign Up

For Organization Administrator Contact Information:

<table>
<thead>
<tr>
<th>STEPS</th>
<th>SCREEN SHOTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Enter First Name, Last Name, Job Title, Phone Number, Email, Address, including City, State, ZIP code and County.</td>
<td><img src="image" alt="Sign Up" /></td>
</tr>
<tr>
<td>2. Indicate if you have an AHA Contact.</td>
<td></td>
</tr>
</tbody>
</table>

### AHA Contact:

If you are currently working with an AHA staff member, please insert there name here.

[Do you have an AHA Contact?]
- [ ] Yes
- [ ] No
- [ ] Not Sure

**First Name**

**Last Name**
For My Life Check Participation:

Next, you will be asked, “Will your organization be utilizing the My Life Check Health Risk Assessment (HRA) to determine workplace wellness?”

![My Life Check Participation]

Click on the information icon at the end of the question to learn more. The information icon will present the following information:

“Performance Measures compares the deidentified data about your employees against a scientifically validated definition of ideal cardiovascular health based on four modifiable health behaviors (not smoking, healthy weight, eating healthy and being physically active) and three health factors (blood pressure, blood cholesterol, and blood sugar) otherwise known at the AHA as “Life’s Simple 7®.” The data will be processed using our secure, HIPAA-compliant third-party data center to produce an initial benchmark of the relative cardiovascular health of your workforce that you can use for later comparisons as you track the progress of your company’s programs.”

Options for submitting your organization’s health performance data are:

1. Using a free version of AHA’s My Life Check® Assessment tool.
2. Using an enhanced version of AHA’s My Life Check Assessment tool for a fee. (Please contact workplacehealthsolutionssupport@heart.org to learn more about the added features and benefits of My Life Check Enhance.)
3. Providing Life’s Simple 7® equivalent data from your organization’s existing health data (health risk assessment and biometric data).

By selecting ‘Yes’, your organization will be enrolled in My Life Check Basic and its health performance data will be automatically integrated into the Workplace Health Achievement Index. (Option 1)

If you select ‘No’, please contact AHA’s Technical Support team at 888-242-453 or workplacehealthsolutionssupport@heart.org to get setup to submit data using one of the alternative data submission options. (Option 2)
For Organization Information:

**Worksite:** Provide your organization name and indicate how many worksites your organization has. Companies can elect to submit separate assessments for each worksite or submit one assessment for the overall company.

**Number of Eligible Employees:** This number refers to the total number of employees eligible for taking a health risk assessment (HRA) and/or eligible for participating in biometric screenings offered by your organization to employees. This number excludes dependents and spouses eligible to participate.

For Create Your Organization’s Account:

**Username:** You can make your own or use the suggested name provided. Username should be no more than 15 characters.

**Password:** The password should include at least 7 characters and no more than 15. It should include at least one letter and one number.
Signing In

To sign into your organization’s Index Admin account, go to the Index Admin Portal. Use the Username and Password you created when you set up your account.

You will be directed to the Workplace Health Achievement Index introduction tab upon successful sign in. You can also access the Index Admin Portal from the Workplace Health Solutions website.

Password Reset Process

If you do not know your Password you may reset your Password as long as you have the account Username.

<table>
<thead>
<tr>
<th>STEPS</th>
<th>SCREEN SHOTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Click “Forgot your password?”</td>
<td><img src="image" alt="Sign In Screen" /></td>
</tr>
<tr>
<td>2. Enter your Username.</td>
<td><img src="image" alt="Reset Link Screen" /></td>
</tr>
<tr>
<td>3. Click SEND RESET LINK button.</td>
<td></td>
</tr>
</tbody>
</table>

Continued
Continued

4. Check your email for the password reset link.
5. Click the password reset link in your email.

You will be directed to the **Password Reset** screen.

Continued

6. Enter **New Password**.
7. Enter **Confirm Password**.
8. Click **Reset Password** button.
9. You will receive confirmation of **Password Reset** before being redirected to **Sign In** screen.
10. Follow **Returning User Sign In** instructions.
Password Update Process

Once signed in, you can update their password in the Settings screen.

### STEPS

<table>
<thead>
<tr>
<th>STEPS</th>
<th>SCREEN SHOTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Enter your Username.</td>
<td><img src="image1" alt="Sign In Screen" /></td>
</tr>
<tr>
<td>2. Enter your Password.</td>
<td>Enter your Username</td>
</tr>
<tr>
<td>3. Click SIGN IN button.</td>
<td>Enter your Password</td>
</tr>
</tbody>
</table>

#### Sign In Screen

You will be directed to the Workplace Health Achievement Index introduction tab upon successful sign in.

#### Continued

4. Click arrow to access Navigation menu.
5. Select Settings.

#### Index Screen -- Introduction Tab

You will be directed to the Settings screen to update your Password.
6. Enter **Username**.

7. Enter **Current password**.

8. Enter **New Password** that should include at least 7 characters and no more than 15, including at least one letter and one number.

9. Confirm **New Password**.

10. Click **SAVE** button.

---

You will be redirected to the **Workplace Health Achievement Index** introduction tab.
Section 1: Organization & Demographic Information

Fields with a red asterisk (*) are required.

ORGANIZATION

1. Enter **Organization Name**. (Registered organizations will display in the dropdown menu when user types).

2. Enter **Headquarters location**.

3. Select radio button **Yes** or **No** indicating Headquarters applying for recognition.

4. Select radio button **Yes** or **No** indicating Headquarters applying on behalf of branch worksites.
5. Enter **Address** Line 1: street address, P.O. box, organization name, c/o.

6. Enter **Address** Line 2: apartment, suite, unit, building, floor, etc.

7. Enter **City**.

8. Enter **State** by selecting dropdown arrow.

9. Enter **Zip Code**.

10. **County** auto populates upon zip code entry.
Continued

11. Enter **Region** by selecting dropdown arrow.

12. Enter **Number of U.S. worksites** (individual, geographically dispersed worksites).

---

### Organization & Demographic Information Tab -- Organization

#### States by Region

<table>
<thead>
<tr>
<th>Region</th>
<th>States</th>
</tr>
</thead>
<tbody>
<tr>
<td>Northeast</td>
<td>CT, DC, ME, MA, NH, NJ, NY, PA, RI, VT</td>
</tr>
<tr>
<td>South</td>
<td>IA, IL, IN, KS, MI, MN, MO, NE, ND, OH, PR, SD, WI</td>
</tr>
<tr>
<td>Midwest</td>
<td>AL, AR, DE, FL, GA, KY, LA, MD, MS, NC, OK, SC, TN, TX, VA, WY</td>
</tr>
<tr>
<td>West</td>
<td>AK, AZ, CA, CO, HI, ID, MT, NM, NV, OR, UT, WA, WY</td>
</tr>
</tbody>
</table>
13. Enter **Organization Type** by selecting dropdown arrow. (List based on NAICS codes).

14. Enter **Organization Classification** by selecting dropdown arrow.
15. Enter **Total Number of Employees** for **Worksite Size**.

16. Enter **Worksite Size Classification** by selecting dropdown arrow.

17. Select radio button **Yes** or **No** to indicate **provisions/contributions to employer-based health insurance coverage**. (If **No**, continue to step 20. If **Yes**, continue to step 18).
18. Enter **Total U.S. employees covered** (eligible).
19. Enter **Total U.S. dependents covered** (eligible).
20. Enter **Annual Gross Revenue** by selecting dropdown arrow.
21. Click **Save** button.

22. Click **OK** button on **Confirmation** pop-up.

You will return to the **Organization** section.
DEMOGRAPHICS

1. Click **Demographics** section to open.

The **Demographics** section will expand.
Continued

2. Enter **Gender Ratio % of Male**.
3. Enter **Gender Ratio % of Female**.
4. Enter **Age Group Distribution % <18 years of age**.
5. Enter **Age Group Distribution % 18--34 years of age**.
6. Enter **Age Group Distribution % 35--44 years of age**.
7. Enter **Age Group Distribution % 45--64 years of age**.
8. Enter **Age Group Distribution % >65 years of age**.
9. Enter **Average Employee Age**.

**Organization & Demographic Information Tab -- Demographics**
10. Enter Job Type % Salaried.
11. Enter Job Type % Hourly.
12. Enter Work Status % Full-time employees.
13. Enter Work Status % Part-time.
14. Enter Work Status % Temporary.
15. Enter Work Status % Telecommuters.
16. Enter Work Tenure % Employed < 1 year.
17. Enter Work Tenure % Employed 1–2 years.
18. Enter Work Tenure % Employed 3–5 years.
19. Enter Work Tenure % Employed >5 years.

*Percentages must add up to 100.*
Continued

20. Enter **Annual Employee Income Before Taxes** (annualized for temp. / part-time employees) **% Lowest 20** ($0 -- $18,361).


22. Enter **Annual Employee Income Before Taxes** (annualized for temp. / part-time employees) **% Third 20** ($35,682 -- $59,548).

23. Enter **Annual Employee Income Before Taxes** (annualized for temp. / part-time employees) **% Fourth 20** ($59,549 -- $99,622).

24. Enter **Annual Employee Income Before Taxes** (annualized for temp. / part-time employees) **% Highest 20** ($99,632 and above).

**Organization & Demographic Information Tab** - **Demographics**


Percentages must add up to 100.
25. Enter **Education Level % Some High School**.
26. Enter **Education Level % High School Diploma**.
27. Enter **Education Level % Associate Degree**.
28. Enter **Education Level % Some College**.
29. Enter **Education Level % Bachelor Degree**.
30. Enter **Education Level % Advanced Degree**.

Percentages must add up to 100.

26. Enter **Education Level % High School Diploma**.
27. Enter **Education Level % Associate Degree**.
28. Enter **Education Level % Some College**.
29. Enter **Education Level % Bachelor Degree**.
30. Enter **Education Level % Advanced Degree**.

31. Enter **Approximate employees who are Spanish-language speakers**.
32. Enter **Approximate employees who speak English as a second language**.
33. Enter **Average Annual Voluntary Turnover Rate**.
34. Enter estimated % of your U.S. population who are American Indian/Alaska Native.

35. Enter estimated % of your U.S. population who are Asian/Asian American.

36. Enter estimated % of your U.S. population who are Black or African American.

37. Enter estimated % of your U.S. population who are Hispanic/Latino.

38. Enter estimated % of your U.S. population who are Native Hawaiian/Pacific Islander.

39. Enter estimated % of your U.S. population who are White.

40. Enter estimated % of your U.S. population who are Other.

41. Click Save button.

Percentages must add up to 100.

---

**Organization & Demographic Information Tab -- Demographics**

---

42. Click OK button on Confirmation pop--up.

You will return to the Demographic section.
WORKSITE HEALTH PROMOTION PROGRAM ELEMENTS

1. Click **Worksite Health Promotion Program Elements** section to open.

The **Worksite Health Promotion Program Elements** section will expand.

*Index Screen -- Organization & Demographic Information Tab*
2. Select all boxes that apply (at least one box must be selected).
3. Click Save button.

---

**Organization & Demographic Information Tab – Worksite Health Promotion Program Elements**

---

4. Click OK button on Confirmation pop-up.

---

**Confirmation Pop-up**

You will return to the Worksite Health Promotion Program Elements section.
# USE OF INCENTIVES

<table>
<thead>
<tr>
<th>STEPS</th>
<th>SCREEN SHOTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Click <strong>Use of Incentives</strong> section to open.</td>
<td><img src="image" alt="Index Screen -- Organization &amp; Demographic Information Tab" /></td>
</tr>
</tbody>
</table>

The **Use of Incentives** section will expand.

**Continued**

2. Select radio button **Yes** or **No** to indicate provision of participatory incentives. (If **No**, continue to step 5. If **Yes**, continue to step 4).

3. Enter the **maximum annual incentive for participatory programs** ($ per employee per year).

![Organization & Demographic Information Tab – Use of Incentives](image)
4. Select radio button Yes or No to indicate provision of health-contingent, activity-only incentives. (If No, continue to step 7. If Yes, continue to step 6).

5. Enter the maximum annual incentive for health-contingent, activity-only incentive programs ($ per employee per year).

6. Select radio button Yes or No to indicate provision of health-contingent, outcomes-based incentives. (If No, continue to step 9. If Yes, continue to step 8).

7. Enter the maximum annual incentive for health-contingent, outcomes-based incentive programs ($ per employee per year).

8. Select radio button Yes or No to indicate financial incentives communicated as a reward.

9. Select all boxes that apply (or none) to indicate the structure of incentive programs you use.

10. Click Save button.
Continued

11. Click OK button on Confirmation pop-up.

You will return to the Use of Incentives section.
PERSON(S) COMPLETING THE INDEX

1. Click Person(s) Completing the Index section to open.

The Person(s) Completing the Index section will expand.
2. Select all boxes that apply (at least one box must be selected) indicating the person(s) and their job roles/positions who have assisted in completing this form.

3. Click Save button.

Organization & Demographic Information Tab – Person(s) Completing the Index

Continued

4. Click OK button on Confirmation pop-up.

Confirmation Pop-up

You will return to the Person(s) Completing the Index section.
## How to Print a Copy of Responses to Section 1

<table>
<thead>
<tr>
<th>STEPS</th>
<th>SCREEN SHOTS</th>
</tr>
</thead>
</table>
| 1. Scroll to bottom of page.  
2. Click **Print** to print Organization & Demographic Information survey. | ![Index Screen -- Organization & Demographic Information Tab](image) |
Section 2: Structure & Process Measures

The user will enter data in the following sections where all questions require an answer.

LEADERSHIP

<table>
<thead>
<tr>
<th>STEPS</th>
<th>SCREEN SHOTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. A1 Select all boxes that apply (at least one box must be selected).</td>
<td></td>
</tr>
<tr>
<td>2. A2 Select radio button <strong>Yes</strong> or <strong>No</strong>.</td>
<td></td>
</tr>
<tr>
<td>3. A3 Select radio button <strong>Yes</strong> or <strong>No</strong>. (If <strong>No</strong> continue to A5).</td>
<td></td>
</tr>
</tbody>
</table>

*Structure & Process Measures Tab -- Leadership*
Continued

4. **A4** Select all boxes that apply (at least one box must be selected).
5. **A5** Select all radio buttons (at least one button must be selected).
6. **A6** Select radio button Yes or No.
7. Click **Save** button.

---

**Structure & Process Measures Tab -- Leadership**

Continued

8. Click **OK** button on **Confirmation** pop-up.

---

You will return to the **Leadership** section.
## ORGANIZATIONAL POLICIES & ENVIRONMENT

<table>
<thead>
<tr>
<th>STEPS</th>
<th>SCREEN SHOTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Click Organizational Policies &amp; Environment accordion bar to open.</td>
<td><img src="image" alt="Screen Shot" /></td>
</tr>
</tbody>
</table>

*Structure & Process Measures Tab*

The **Organizational Policies & Environment** section will expand.
### STEPS

1. **B1** Select all boxes that apply (at least one box must be selected).

2. **B2** Select radio button Yes or No. If No continue to B3, if Yes select all boxes that apply (at least one box must be selected).

3. **B3** Select radio button Yes or No. If No continue to B4, if Yes select all boxes that apply (at least one box must be selected).

### SCREEN SHOTS

![Structure & Process Measures Tab – Organizational Policies & Environment](image_url)

---

**Structure & Process Measures Tab – Organizational Policies & Environment**
4. B4 Select radio button Yes or No.

5. B5 Select radio button Yes or No.

6. B6 Select radio button Yes or No.

7. B7 Select radio button Yes or No.

8. B8 Select radio button Yes or No.
9. **B9** Select radio button **Yes** or **No**.

10. **B10** Select radio button **Yes** or **No**.

   *Note: B10 will only appear and will only be required, if “No” is selected for B9.*

11. **B11** Select radio button **Yes** or **No**. (See [Healthy Workplace Food & Beverage Pledge](#)).

12. **B12** Select radio button **Yes** or **No**.

13. **B13** Select radio button **Yes** or **No**. (See [Healthy Workplace Food & Beverage Toolkit](#)).

14. **B14** Select radio button **Yes** or **No**. (See [Healthy Workplace Food & Beverage Toolkit – Guidance on Vending Machines](#)).
15. **B15** Select radio button **Yes** or **No**. *(See Healthy Workplace Food & Beverage Toolkit)*.

16. **B16** Select radio button **Yes** or **No**.

17. **B17** Select radio button **Yes** or **No**.

18. **B18** Select radio button **Yes** or **No**.

19. **B19** Select radio button **Yes** or **No**.

---

**Structure & Process Measures Tab – Organizational Policies & Environment**

---

**Structure & Process Measures Tab – Organizational Policies & Environment**
20. **B20** Select all boxes that apply (at least one box must be selected).

21. **B21** Select all boxes that apply (at least one box must be selected).

22. **B22** Select all boxes that apply (at least one box must be selected).

23. Click Save button.

**Structure & Process Measures Tab – Organizational Policies & Environment**

Continued

24. Click OK button on Confirmation pop-up.

**Confirmation Pop-up**

You will return to the Organizational Policies & Environment section.
COMMUNICATIONS

1. Click **Communications** section to open.

The **Communications** section will expand.
1. **C1** Select radio button Yes or No.

2. **C2** Select radio button Yes or No.

3. **C3** Select all boxes that apply (at least one box must be selected).

4. **C4** Select radio button Yes or No.

---

**Structure & Process Measures Tab – Communications**
5. **C5** Select radio button **Yes** or **No**.

6. **C6** Select radio button **Annually**, **Quarterly**, or **Monthly**.

7. Click **Save** button.

---

**Structure & Process Measures Tab – Communications**

---

8. Click **OK** button on **Confirmation** pop-up.

---

**Confirmation Pop-up**

You will return to the **Communications** section.

---
## PROGRAMS

### STEPS | SCREEN SHOTS
--- | ---
1. Click **Programs** section to open.

![Structure & Process Measures Tab](image)

The **Programs** section will expand.
1. **D1** Select all boxes that apply (at least one box must be selected).

2. **D2** Select all boxes that apply (at least one box must be selected).

---

**Structure & Process Measures Tab – Programs**

![Screen Shot](image-url)
Continued

3. **D3** Select all boxes that apply (at least one box must be selected).

4. **D4** Select all boxes that apply (at least one box must be selected).

<table>
<thead>
<tr>
<th>Life's Simple Seven (LS7):</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tobacco Cessation</td>
</tr>
<tr>
<td>Nutrition and Healthy Eating</td>
</tr>
<tr>
<td>Physical Activity</td>
</tr>
<tr>
<td>Weight Management</td>
</tr>
<tr>
<td>Blood Pressure</td>
</tr>
<tr>
<td>Cholesterol</td>
</tr>
<tr>
<td>Diabetes</td>
</tr>
<tr>
<td>Other:</td>
</tr>
<tr>
<td>Alcohol or drug abuse</td>
</tr>
<tr>
<td>Depression</td>
</tr>
<tr>
<td>Stress Management</td>
</tr>
<tr>
<td>Sleep</td>
</tr>
<tr>
<td>None of these</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Life's Simple Seven (LS7):</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tobacco Cessation</td>
</tr>
<tr>
<td>Nutrition and Healthy Eating</td>
</tr>
<tr>
<td>Physical Activity</td>
</tr>
<tr>
<td>Weight Management</td>
</tr>
<tr>
<td>Blood Pressure</td>
</tr>
<tr>
<td>Cholesterol</td>
</tr>
<tr>
<td>Diabetes</td>
</tr>
<tr>
<td>Other:</td>
</tr>
<tr>
<td>Alcohol or drug abuse</td>
</tr>
<tr>
<td>Depression</td>
</tr>
<tr>
<td>Stress Management</td>
</tr>
<tr>
<td>Sleep</td>
</tr>
<tr>
<td>None of these</td>
</tr>
</tbody>
</table>
Continued

5. **D5** Select all boxes that apply (at least one box must be selected).

6. **D6** Select radio button **Yes** or **No**.

7. **D7** Select radio button **Yes** or **No**.

---

Structure & Process Measures Tab – Programs
Continued

8. **D8** Select radio button **Yes** or **No**.
9. **D9** Select radio button **Yes** or **No**.
10. **D10** Select radio button **Yes** or **No**.
11. Click **Save** button.

---

**Structure & Process Measures Tab – Programs**

Continued

12. Click **OK** button on **Confirmation** pop-up.

---

**Confirmation Pop-up**

You will return to the **Programs** section.
ENGAGEMENT

**STEPS**

1. Click **Engagement** section to open.

**SCREEN SHOTS**

*Structure & Process Measures Tab*

The **Engagement** section will expand.
<table>
<thead>
<tr>
<th>STEPS</th>
<th>SCREEN SHOTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. <strong>E1</strong> Select radio button Yes or No.</td>
<td></td>
</tr>
<tr>
<td>2. <strong>E2</strong> Select radio button Yes or No. If No continue to <strong>E3</strong>, if Yes, select radio button Yes or No for the subquestion.</td>
<td></td>
</tr>
</tbody>
</table>

*Structure & Process Measures Tab – Engagement*
Continued

3. **E3** Select all boxes that apply, (at least one box must be selected).
4. **E4** Select all boxes that apply, (at least one box must be selected).
5. **E5** Select radio button **Yes** or **No**.
6. **E6** Select radio button **Yes** or **No**.
7. Click **Save** button.

---

**Structure & Process Measures Tab – Engagement**

Continued

8. Click **OK** button on **Confirmation** pop-up.

---

**Confirmation Pop-up**

You will return to the **Engagement** section.
PARTNERSHIPS

1. Click **Partnerships** section to open.

The **Partnerships** section will expand.
### STEPS

1. **F1** Select radio button **Yes** or **No**.
2. Click **Save** button.

### SCREEN SHOTS

**Structure & Process Measures Tab – Partnerships**

Continued

3. Click **OK** button on **Confirmation** pop-up.

---

**Confirmation Pop-up**

You will return to the **Partnerships** section.
REPORTING OUTCOMES

1. Click Reporting Outcomes section to open.

The Reporting Outcomes section will expand.

Structure & Process Measures Tab
1. **G1** Select all boxes that apply, (at least one box must be selected).

2. **G2** Select all boxes that apply, (at least one box must be selected).

3. **G3** Select radio button **Yes** or **No**.

**Structure & Process Measures Tab – Reporting Outcomes**
Continued

4. **G4** Select radio button **Yes** or **No**.
5. Click **Save** button.

*Structure & Process Measures Tab – Reporting Outcomes*

Continued

6. Click **OK** button on **Confirmation** pop-up.

*Confirmation Pop-up*

You will return to the **Reporting Outcomes** section.
# How to Print a Copy of Answers to Section 2

**STEPS**

1. Scroll to bottom of page.
2. Click **Print** to print Structure & Process Measures survey.

**SCREEN SHOTS**

![Index Screen -- Organization & Demographic Information Tab](image-url)
Reviewing Answers to Section 2

Confirming That Section 2 Has Been Completed

Each module in the Review tab represents a section in the Structure & Process Measures tab. The user has successfully completed the survey when all modules have a Completed check.

Complete Survey

No action is necessary. All sections in the Structure & Process Measures tab have been completed.

Review Tab – Complete Survey
Incomplete Section 2

If the user has not completed the required questions in the **Structure & Process Measures** tab, the Index Dashboard will not be available to the user, and the **Review** module will alert the user to the number of questions requiring an answer within each section.

The user will return to the Structure & Process Measures tab to complete the survey.

**Performance Measures Tab**
2. Click the section that was identified as being incomplete.

Finalize all questions within the section. Hit the “Save” button.
Additional Key Information

Section 3: Performance Measures

For information on how to submit employee health data for the three Index Performance Measures, refer to the document: Choosing Method to Submit Employee Health Data. This document will explain the three methods that are available for submitting employee health data and provide details about the data requirements that must be met.

Annual Cutoff Date for Completing the Index

You can access the Index at any time throughout the year to modify your answers, but please be aware the annual cutoff date for determining recognitions is March 31st at 11:59 p.m. Pacific. At this point, you will no longer be able to make changes to the survey and it will be submitted as is. To guarantee that your employee health data is submitted on time if using Aggregate or Batch processes, please submit by March 15th. Due to high volume of organizations submitting data in the weeks prior to the deadline, a lag time is expected for data processing.
Scoring

Section 1 is not scored. However, organization information is required so we can communicate results with you. Demographic information is voluntary. Points allocated for sections 2 and 3 are as follows:

<table>
<thead>
<tr>
<th>INDEX MEASURES</th>
<th># OF QUESTIONS</th>
<th>POINTS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Section 2: Structure and Process Measures (Culture of Health)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Leadership</td>
<td>6</td>
<td>17</td>
</tr>
<tr>
<td>Policies &amp; Environment</td>
<td>22</td>
<td>52</td>
</tr>
<tr>
<td>Communications</td>
<td>6</td>
<td>16</td>
</tr>
<tr>
<td>Programs</td>
<td>10</td>
<td>31</td>
</tr>
<tr>
<td>Engagement</td>
<td>6</td>
<td>15</td>
</tr>
<tr>
<td>Partnerships</td>
<td>1</td>
<td>5</td>
</tr>
<tr>
<td>Reporting Outcomes</td>
<td>4</td>
<td>15</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>55</strong></td>
<td><strong>151</strong></td>
</tr>
<tr>
<td><strong>Section 3: Performance Measures (Employee Health Data)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Performance Measure 1: Percent of Employee Health Data Submitted</td>
<td>1</td>
<td>33</td>
</tr>
<tr>
<td>Performance Measure 2: Organization Heart Health Score</td>
<td>1</td>
<td>33</td>
</tr>
<tr>
<td>***Performance Measure 3: Relative Improvement in Organization Heart Health Score (%)</td>
<td>1</td>
<td>33</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>3</strong></td>
<td><strong>99</strong></td>
</tr>
<tr>
<td><strong>INDEX TOTAL</strong></td>
<td><strong>58</strong></td>
<td><strong>250</strong></td>
</tr>
</tbody>
</table>

*** Organizations are eligible to receive points for Performance Measure 3 in their second and subsequent years of participation if all data requirements for the Performance Measures were met the previous year.

Organizations that do not quality for Performance Measure 3 points are not penalized. These organizations can achieve a maximum Total Index Score of 217 points, which consists of the max 151 points an organization can achieve in Section 2 for answering the 55 Structure and Process questions and the 66 points that can be achieved for Performance Measure 1 and Performance Measure 2.
Organizations that do quality for Performance Measure 3 points receive this credit as “bonus points.” Organizations that qualify for Performance Measure 3 can receive up to 33 points, which allows these organizations to obtain a maximum Total Index Score of 250 points. In 2016, 2017 and 2018, organizations that qualify for Performance Measure 3 points will be scored out of 217 points despite being able to achieve a maximum of 250 points, thus rewarding these organizations with “bonus” points for their achieved improvement in organizational Heart Health Score. This “bonus point” scoring for Performance Measure 3 is subject to change for Index 2019 cycle (April 1, 2018-March 31, 2019).
Recognitions

Organizations are eligible for Gold, Silver, Bronze or Completer recognition based on their Total Index Scores.

Companies that receive recognition are eligible to receive promoted recognition, including but not limited to:

- Digital campaign materials for companies to promote their award on their company website and social media
- A press release template
- Listing on Heart.org
- Recognition certificate, plaque, and window decal

Recognition offerings are subject to change year to year.
Index Dashboard

You can view your results in the **Index Dashboard**. Reports are updated upon page load.

**Tip:** The initial load of data for the Index Dashboard may take up to 4 hours for data to be displayed.

<table>
<thead>
<tr>
<th>STEPS</th>
<th>SCREEN SHOTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Click arrow to access <strong>Navigation</strong> menu.</td>
<td><img src="image" alt="Index Screen – Introduction Tab" /></td>
</tr>
<tr>
<td>2. Select <strong>Index Dashboard</strong>.</td>
<td></td>
</tr>
</tbody>
</table>

You will be directed to the **Index Dashboard** screen.

**Tip:** If you have not started/completed the Index, and try to view the Index Dashboard a warning popup will display.

![Confirmation](image)

**Warning Pop-up**

Click the Ok button. You will be directed to the **Workplace Health Achievement Index** tab to complete the Worksite Size Classification and Organization Classification in the **Organization and Demographic Information** section, and respond to all questions in the **Structure and Process Measures** section.
From the **Index Dashboard** you will be able to **Download to PDF** reports.

**TIP:** If you do not have any missing data but cannot see your Index Dashboard for the current year, please review your Structure & Process answers in the Workplace Health Achievement Index and select the "Update" button. This may help display your results because your responses may be stored in the system from a previous year, but has not yet been pulled forward for the current year. Hitting the "Update" button, will allow your entered responses to be counted for the current year.
INTERPRETING SCORES

TOTAL INDEX SCORE

This graph shows your organization’s Total Index Score compared to the average Total Index Score of your peer companies participating in the Index by Worksite Size Classification and Organizational Classification.

LEADERSHIP

Similarly, this graph shows how your performance compares to peer companies.
ORGANIZATIONAL POLICIES & ENVIRONMENT
This graph shows how your performance compares to peer companies.

COMMUNICATIONS
This graph shows how your performance compares to peer companies.
PROGRAMS
This graph shows how your performance compares to peer companies.

![Programs Graph]

ENGAGEMENT
This graph shows how your performance compares to peer companies.

![Engagement Graph]
PARTNERSHIPS

This graph shows how your performance compares to peer companies.

REPORTING OUTCOMES

This graph shows how your performance compares to peer companies.
Downloading a PDF

You can Download the reports to PDF.

**STEPS**

1. Click **Download** to download results to **PDF**.

**SCREEN SHOTS**

*Dashboard Screen*

The report will Download to new window.