



Workplace Health Solutions
Center for Workplace Health Research & Evaluation

Workplace Health Achievement Index

User Guide for Enrolling and Completing Sections 1 and 2

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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:

PART ONE: ORGANIZATION & DEMOGRAPHIC INFORMATION

- **Organizational Info (Required)** includes name, address, type, industry, size
- **Workforce Demographic Info (Voluntary)** includes aggregate employee characteristics, such as gender, age, ethnicity, job type, work status, annual income, education level, languages spoken, turnover rate

PART TWO: STRUCTURE & PROCESS MEASURES
Complete 55-item questionnaire based on 7 best-practice pillars of effective workplace health programs

 Leadership	 Policies & Environment	 Communications	 Programs	 Engagement	 Partnerships	 Evaluation & Reporting Outcomes
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Evidence-based strategies

PART THREE: PERFORMANCE MEASURES
Used My Life Check® or submit aggregated employee health data based on Life's Simple 7®.

Measure 1: % of Employee Health Data Submitted
Measure 2: Organization Heart Health Score
Measure 3: Annual Relative Improvement Score

 Smoking Status	 Physical Activity	 Healthy Diet	 Healthy Weight	 Blood Pressure	 Total Cholesterol	 Fasting Blood Glucose
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Life's Simple 7®

Scientifically validated measures of ideal cardiovascular health

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

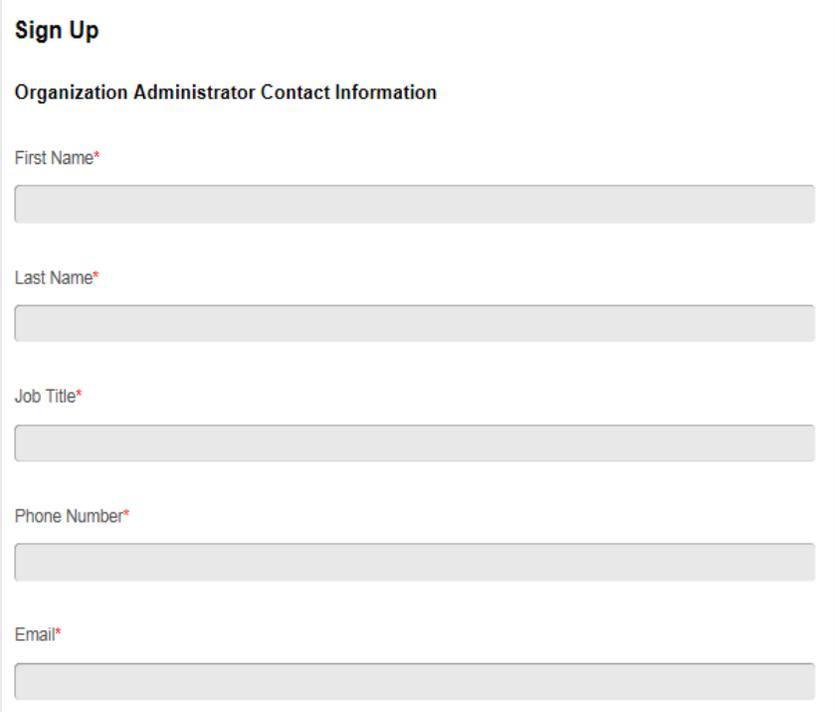
To set up an Index Admin account, access the Index Admin Portal from the [Workplace Health Solutions website](#) and click on the “Get Started” button (refer to arrow).



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:

STEPS	SCREEN SHOTS
<ol style="list-style-type: none">1. Enter First Name, Last Name, Job Title, Phone Number, Email, Address, including City, State, ZIP code and County.2. Indicate if you have an AHA Contact.	 <p>Sign Up</p> <p>Organization Administrator Contact Information</p> <p>First Name*</p> <p>Last Name*</p> <p>Job Title*</p> <p>Phone Number*</p> <p>Email*</p>

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

Will your organization be utilizing the My Life Check Health Assessment to determine workplace wellness? * ⓘ

Yes

No



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.

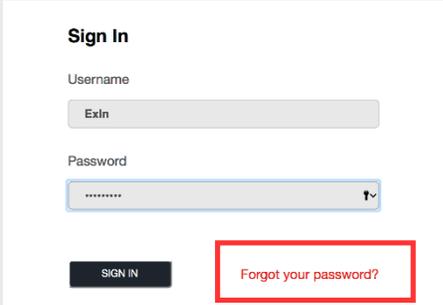
Signing In

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.

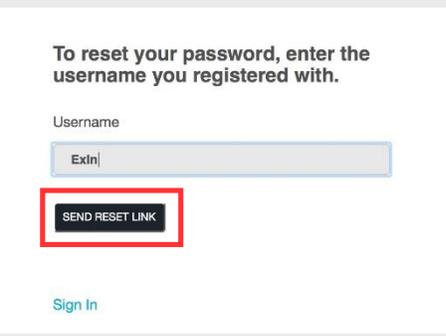
Password Reset Process

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

STEPS	SCREEN SHOTS
1. Click " Forgot your password? "	 <p>The screenshot shows a 'Sign In' form with fields for 'Username' (containing 'ExIn') and 'Password'. Below the password field is a 'SIGN IN' button and a 'Forgot your password?' link, which is highlighted with a red rectangular box.</p>

Sign In Screen

Continued

2. Enter your Username . 3. Click SEND RESET LINK button.	 <p>The screenshot shows a screen titled 'To reset your password, enter the username you registered with.' It has a 'Username' field containing 'ExIn '. Below the field is a 'SEND RESET LINK' button, highlighted with a red rectangular box. At the bottom, there is a 'Sign In' link.</p>
--	---

Reset Link Screen

Continued

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

Thank you!

Your password reset link has been sent to your registered email. Please check it!

Confirmation

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.

Reset your password.

New Password

Confirm Password

Reset Password

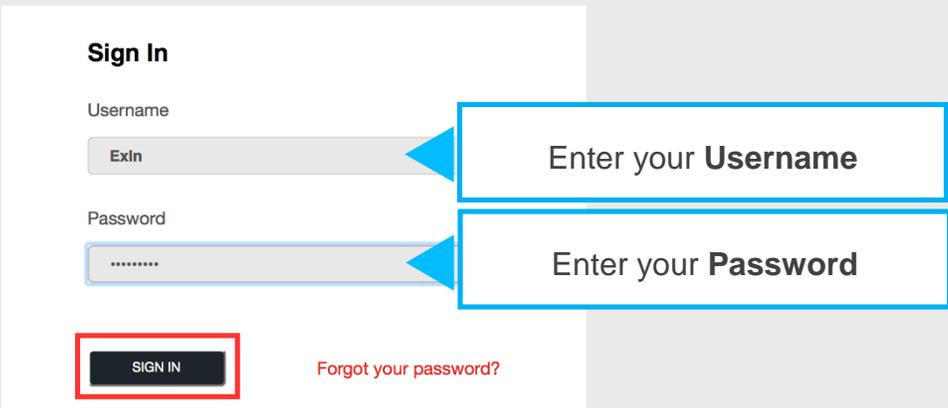
[Sign In](#)

Your password reset was successful! If you are not redirected within 10 seconds, please click or copy & paste the following URL into your browser's address bar

Reset Your Password Screen & Confirmation

Password Update Process

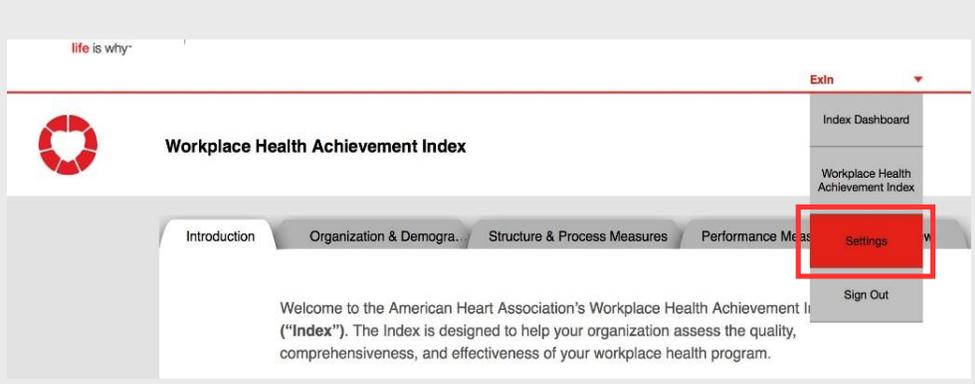
Once signed in, you can update their password in the **Settings** screen.

STEPS	SCREEN SHOTS
<ol style="list-style-type: none">1. Enter your Username.2. Enter your Password.3. Click SIGN IN button.	

Sign In Screen

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

Continued

<ol style="list-style-type: none">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**.

Continued

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.

The screenshot shows a registration form with the following elements:

- Username:** A text input field containing the text "ExIn".
- Current*:** A password input field with masked characters "*****".
- New*:** A password input field with masked characters "*****".
- Confirm New*:** A password input field with masked characters "*****" and a visibility toggle icon.
- Instructions:** A note below the password fields stating: "Password should include at least 7 characters and no more than 15, including at least one letter and one number."
- Buttons:** Two buttons at the bottom: "CANCEL" and "SAVE". The "SAVE" button is highlighted with a red rectangular border.

Settings Screen

Continued

11. Click **OK** button on the **Confirmation** pop-up.

The screenshot shows a confirmation dialog box with the following elements:

- Header:** A red bar at the top with the text "Confirmation".
- Message:** The text "Your changes have been saved." centered in the dialog.
- Button:** A black button with the text "OK" centered below the message. The button is highlighted with a red rectangular border.

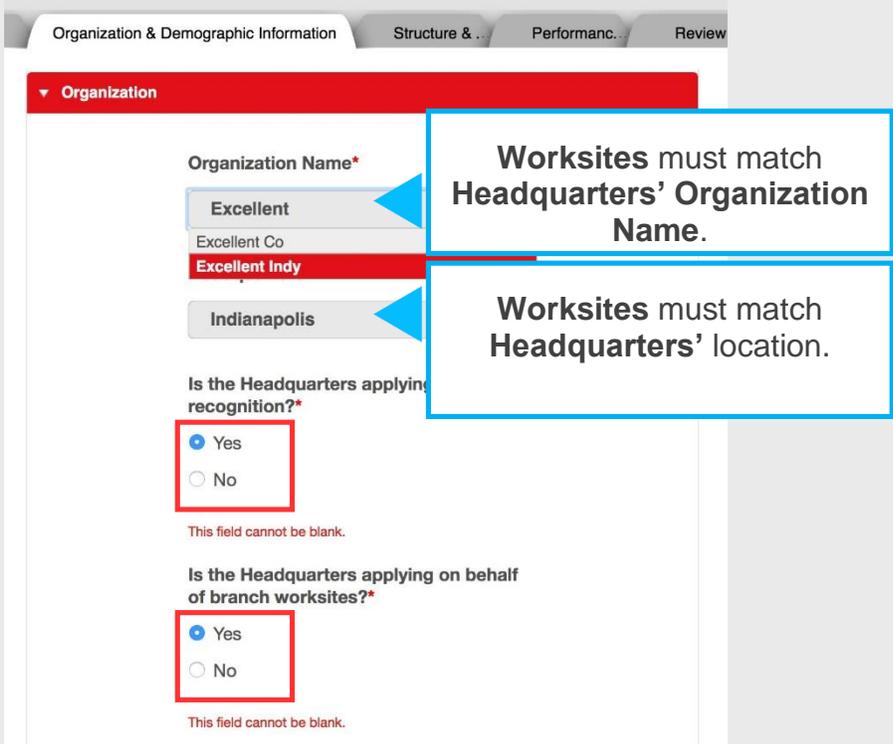
Confirmation Pop-up

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

STEPS	SCREEN SHOTS
<ol style="list-style-type: none">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.	 <p>Organization & Demographic Information Structure & ... Performanc... Review</p> <p>Organization</p> <p>Organization Name*</p> <p>Excellent Excellent Co Excellent Indy Indianapolis</p> <p>Worksites must match Headquarters' Organization Name.</p> <p>Worksites must match Headquarters' location.</p> <p>Is the Headquarters applying for recognition?*</p> <p><input checked="" type="radio"/> Yes <input type="radio"/> No</p> <p>This field cannot be blank.</p> <p>Is the Headquarters applying on behalf of branch worksites?*</p> <p><input checked="" type="radio"/> Yes <input type="radio"/> No</p> <p>This field cannot be blank.</p>

Organization & Demographic Information Tab -- Organization

Continued

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.

Worksite Applicant

Address Line 1*

76 E. Main St.

This field cannot be blank.

Street address, P.O. box, company name, c/o

Address Line 2

Apartment, suite, unit, building, floor, etc.

City*

Indianapolis

This field cannot be blank.

State*

Indiana



This field cannot be blank.

Zip Code*

46201

This field cannot be blank.

County*

Marion

County auto populates with zip code entry.

Organization & Demographic Information Tab -- Organization

Continued

11. Enter **Region** by selecting dropdown arrow.
12. Enter **Number of U.S. worksites** (individual, geographically dispersed worksites).

The screenshot shows a web form with two main sections. The first section is labeled "Region*" and contains a dropdown menu currently set to "Midwest". A red square highlights the dropdown arrow. The dropdown menu is open, showing four options: "Northeast", "South", "Midwest" (which is selected with a blue bar and a checkmark), and "West". The second section is labeled "Number of U.S. worksites (individual, geographically dispersed worksites)*" and contains a text input field with the number "10" entered. Below the input field, there is a red error message that reads "This field cannot be blank."

Organization & Demographic Information Tab -- Organization

States by Region

Northeast	CT, DC, ME, MA, NH, NJ, NY, PA, RI, VT
South	IA, IL, IN, KS, MI, MN, MO, NE, ND, OH, PR, SD, WI
Midwest	AL, AR, DE, FL, GA, KY, LA, MD, MS, NC, OK, SC, TN, TX, VA, WV
West	AK, AZ, CA, CO, HI, ID, MT, NM, NV, OR, UT, WA, WY

Continued

13. Enter **Organization Type** by selecting dropdown arrow. (List based on NAICS codes).
14. Enter **Organization Classification** by selecting dropdown arrow.

The screenshot shows two dropdown menus. The first is titled "Organization Type*" and has "Private Company" selected. The dropdown list includes: Private Company, Public Company, Nonprofit, School/School District, University/ College Campus, Faith-based Organization, Community Organization (e.g. health centers, insurance companies, and other), and Other (checked). Below the list is a red error message: "This field cannot be blank." The second dropdown is titled "Organization Classification*" and has "Retail Trade" selected. The dropdown list includes: Agriculture, Forestry, Fishing and Hunting, Mining, Utilities, Construction, Manufacturing, Wholesale Trade, Retail Trade (checked), Transportation and Warehousing, Information, Finance and Insurance, Professional Scientific and Technical Services, Real Estate Rental and Leasing, Management of Companies and Enterprises, Administrative and Support and Waste Management and Remediation Services, Education Services, Health Care and Social Assistance, Arts, Entertainment and Recreation, Accommodation and Food Services, Public Administration, and Other Services. Below the list is a red error message: "This field cannot be blank."

Organization & Demographic Information Tab -- Organization

Continued

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).

The screenshot displays a form titled "Worksite Size*" with the following fields and options:

- Total Number of Employees***: A text input field containing the number "10".
- Worksite Size Classification***: A dropdown menu currently showing "< 50 employees". A red box highlights the dropdown arrow. Below the dropdown is a list of options: "< 50 employees" (selected with a blue checkmark), "50-249 employees", "250-749 employees", "750-4,999 employees", and "> 5,000 employees".
- Do you provide (or make contributions to) employer-based health insurance coverage?***: A question with two radio button options: "Yes" (selected) and "No".

Organization & Demographic Information Tab -- Organization

Continued

- 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.

Total U.S. employees covered (eligible employees)*

60

Total U.S. dependents covered (eligible dependents)*

150

Annual Gross Revenue

\$1M-\$10M

N/A
0-\$1M
✓ \$1M-\$10M
\$10M-\$100M
\$100M-\$500M
\$500M-\$1B
More than \$1B

Save

Organization & Demographic Information Tab -- Organization

Continued

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

Confirmation

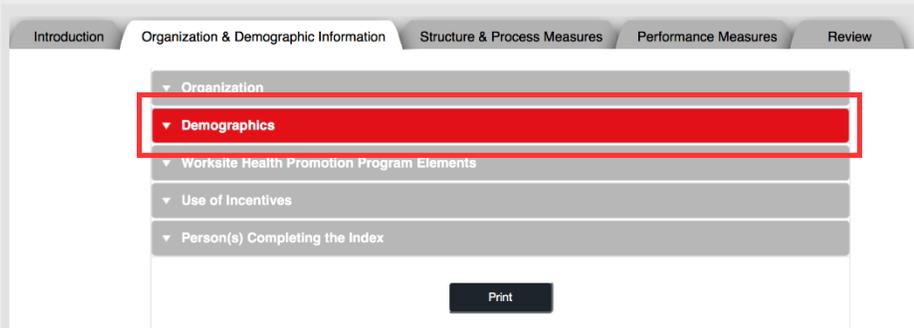
Your changes have been saved.

OK

Confirmation Pop-up

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

DEMOGRAPHICS

STEPS	SCREEN SHOTS
1. Click Demographics section to open.	 A screenshot of a web application interface. At the top, there are five tabs: 'Introduction', 'Organization & Demographic Information', 'Structure & Process Measures', 'Performance Measures', and 'Review'. The 'Organization & Demographic Information' tab is active. Below the tabs, there is a list of expandable sections: 'Organization', 'Demographics', 'Worksite Health Promotion Program Elements', 'Use of Incentives', and 'Person(s) Completing the Index'. The 'Demographics' section is highlighted with a red rectangular box. At the bottom right of the content area, there is a 'Print' button.

Index Screen -- Organization & Demographic Information Tab

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

Demographics

Gender Ratio*

60 % Male

40 % Female

Age Group Distribution*

5 % <18 years of age

20 % 18-34 years of age

30 % 35-44 years of age

40 % 45-64 years of age

5 % >65 years of age

Average Employee Age*

38

Percentages must add up to 100.

Percentages must add up to 100.

Organization & Demographic Information Tab -- Demographics

Continued

- 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.

The screenshot displays a form with three main sections: Job Type, Work Status, and Work Tenure. Each section has a title with an asterisk and a list of input fields. Callout boxes with blue borders and arrows point to the 'Job Type*' and 'Work Status*' titles, and another callout box points to the 'Work Tenure*' title. The 'Work Tenure*' section has a blue border around the '55' input field.

Section	Category	Value	Description
Job Type*	% Salaried	95	
	% Hourly	5	
Work Status*	% Full-time employees	95	
	% Part-time	3	
	% Temporary	1	
	% Telecommuters	1	
Work Tenure*	% Employed < 1 year	5	
	% Employed 1-2 years	30	
	% Employed 3-5 years	55	
	% Employed > 5 years	10	

Organization & Demographic Information Tab -- Demographics

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).
- 21. Enter **Annual Employee Income Before Taxes**
 (annualized for temp. / part--time employees) % **Second 20** (\$18,362 -- \$35,681).
- 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).

Annual Employee Income Before Taxes
 (annualized for temporary / part-time employees)*

<input style="width: 80%;" type="text" value="5"/>	% Lowest 20 (\$0 - \$18,361)
<input style="width: 80%;" type="text" value="20"/>	% Second 20 (\$18,362 - \$35,681)
<input style="width: 80%;" type="text" value="60"/>	% Third 20 (\$35,682 - \$59,548)
<input style="width: 80%;" type="text" value="10"/>	% Fourth 20 (\$59,549 - \$99,622)
<input style="width: 80%;" type="text" value="5"/>	% Highest 20 (\$99,632 and above)

(Source: Consumer Expenditure Survey, 2014;
<http://www.bls.gov/cex/2014/combined/decile.pdf>).

Organization & Demographic Information Tab -- Demographics

Continued

- 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.**

The screenshot shows a form titled "Education Level*" with six input fields. A blue callout box with a white background and a blue border points to the first field, containing the text "Percentages must add up to 100." The input fields contain the following values: 5, 5, 5, 10, 60, and 15. Each field is followed by a percentage label: "% Some High School", "% High School Diploma", "% Associate Degree", "% Some College", "% Bachelor Degree", and "% Advanced Degree".

Education Level	Percentage
Some High School	5
High School Diploma	5
Associate Degree	5
Some College	10
Bachelor Degree	60
Advanced Degree	15

Organization & Demographic Information Tab -- Demographics

Continued

- 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.**

The screenshot shows a form with three input fields. The first field is labeled "Approximate employees who are Spanish-language speakers*" and contains the value "10". The second field is labeled "Approximate employees who speak English as a second language*" and contains the value "2". The third field is labeled "Average Annual Voluntary Turnover Rate*" and contains the value "5". Each field is followed by a percentage sign (%).

Demographic Information	Value
Approximate employees who are Spanish-language speakers*	10
Approximate employees who speak English as a second language*	2
Average Annual Voluntary Turnover Rate*	5

Organization & Demographic Information Tab -- Demographics

Continued

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.

Please enter the estimated percentage of your U.S. population who are*

<input type="text" value="2"/>	% American Indian/Alaska Native
<input type="text" value="10"/>	% Asian/Asian American
<input type="text" value="10"/>	% Black or African American
<input type="text" value="55"/>	% Hispanic/Latino
<input type="text" value="0"/>	% Native Hawaiian/Pacific Islander
<input type="text" value="20"/>	% White
<input type="text" value="3"/>	% Other

Organization & Demographic Information Tab -- Demographics

Continued

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

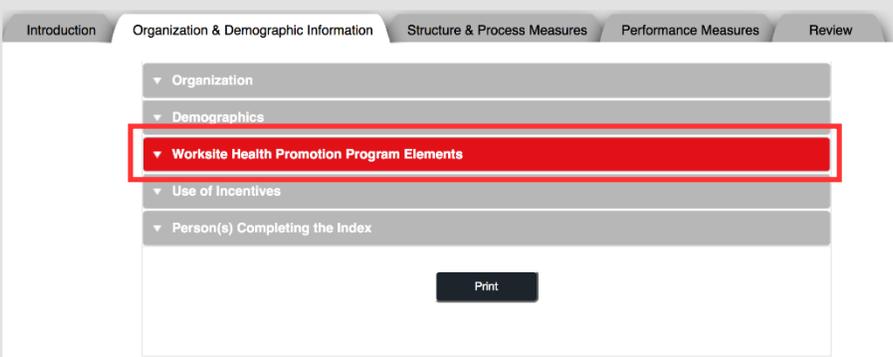
Confirmation

Your changes have been saved.

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

Confirmation Pop-up

WORKSITE HEALTH PROMOTION PROGRAM ELEMENTS

STEPS	SCREEN SHOTS
1. Click Worksite Health Promotion Program Elements section to open.	 <p>The screenshot shows a web interface with five tabs: Introduction, Organization & Demographic Information, Structure & Process Measures, Performance Measures, and Review. The 'Organization & Demographic Information' tab is active. Below the tabs is a list of expandable sections: Organization, Demographics, Worksite Health Promotion Program Elements (highlighted with a red box), Use of Incentives, and Person(s) Completing the Index. A 'Print' button is located at the bottom of the list.</p>

Index Screen -- Organization & Demographic Information Tab

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

Continued

2. Select **all boxes that apply** (at least one box must be selected).
3. Click **Save** button.

Worksite Health Promotion Program Elements (check all that apply)*

- Health education (e.g., skills development and behavior change programs)
- Links to related employee services (e.g., referral to employee assistance program)
- Supportive physical and social environment for health improvement (e.g., tobacco-free policy, healthy food and beverage policy etc.)
- Integration of health promotion into your organization's culture (e.g., health promotion being part of your business' strategic plan)
- Employee health screenings with adequate treatment and follow-up

Save

Organization & Demographic Information Tab – Worksite Health Promotion Program Elements

Continued

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

Confirmation

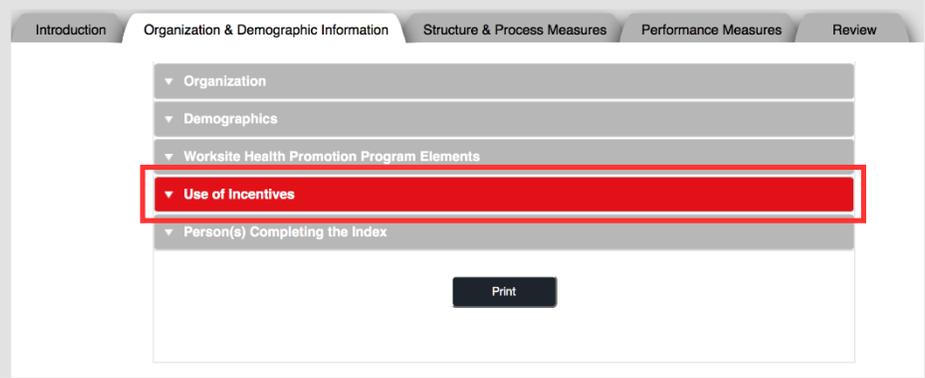
Your changes have been saved.

OK

Confirmation Pop-up

You will return to the **Worksite Health Promotion Program Elements** section.

USE OF INCENTIVES

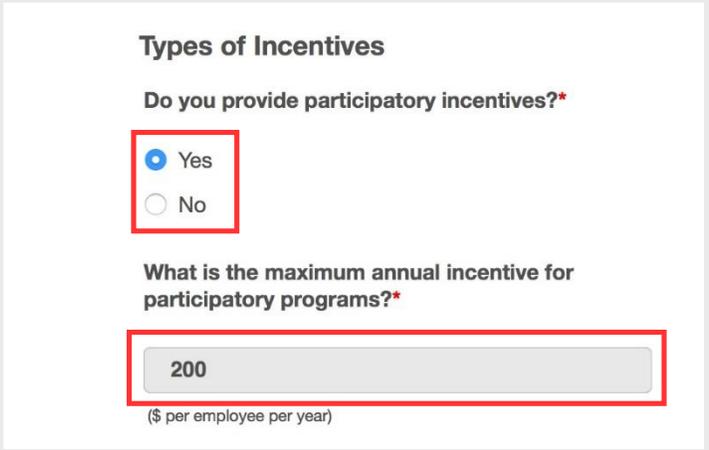
STEPS	SCREEN SHOTS
1. Click Use of Incentives section to open.	 <p>The screenshot shows a navigation menu with tabs: Introduction, Organization & Demographic Information (selected), Structure & Process Measures, Performance Measures, and Review. Under the selected tab, there is a list of sections: Organization, Demographics, Worksite Health Promotion Program Elements, Use of Incentives (highlighted with a red box), and Person(s) Completing the Index. A 'Print' button is visible at the bottom of the list.</p>

Index Screen -- Organization & Demographic Information Tab

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).



The screenshot shows the 'Types of Incentives' section. It asks 'Do you provide participatory incentives?*' with two radio buttons: 'Yes' (selected and highlighted with a red box) and 'No'. Below this, it asks 'What is the maximum annual incentive for participatory programs?*' with a text input field containing '200' (highlighted with a red box) and a note '(\$ per employee per year)'.

Organization & Demographic Information Tab – Use of Incentives

Continued

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.

The screenshot shows a form titled "Organization & Demographic Information Tab – Use of Incentives". It contains several sections with red boxes highlighting specific elements:

- Do you provide health-contingent, activity-only incentives?***
 - Yes
 - No
- What is the maximum annual incentive for health-contingent, activity-only incentive programs?***
 - 150
 - (\$ per employee per year)
- Do you provide health-contingent, outcomes-based incentives?***
 - Yes
 - No
- What is the maximum annual incentive for health-contingent, outcomes-based incentive programs?***
 - 100
 - (\$ per employee per year)
- Are financial incentives communicated as a reward?***
 - Yes
 - No
- Structure of Incentive Programs**

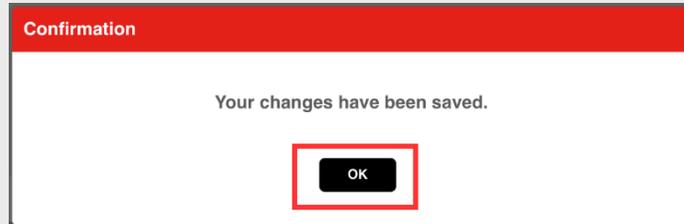
Please indicate the structure of incentive programs you use (check all that apply)*

 - Individual rewards
 - Individual deposits
 - Group rewards
 - Group deposits
 - Other
- Save** button

Organization & Demographic Information Tab – Use of Incentives

Continued

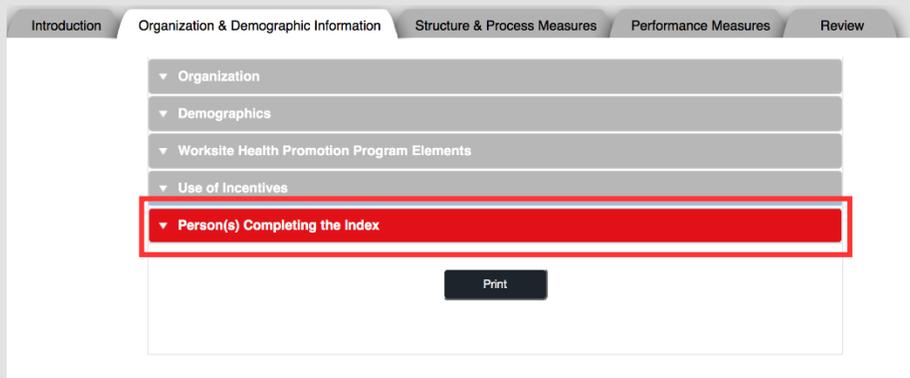
11. Click **OK** button on
Confirmation pop--up.



Confirmation Pop-up

You will return to the **Use of Incentives** section.

PERSON(S) COMPLETING THE INDEX

STEPS	SCREEN SHOTS
1. Click Person(s) Completing the Index section to open.	 <p>The screenshot shows a web interface with five tabs: Introduction, Organization & Demographic Information (selected), Structure & Process Measures, Performance Measures, and Review. Under the selected tab, there are five expandable sections: Organization, Demographics, Worksite Health Promotion Program Elements, Use of Incentives, and Person(s) Completing the Index. The 'Person(s) Completing the Index' section is highlighted with a red border. Below these sections is a 'Print' button.</p>

Index Screen -- Organization & Demographic Information Tab

The **Person(s) Completing the Index** section will expand.

Continued

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.

Indicate the person(s) and their job roles/positions who have assisted in completing this form (check all that apply)*

- Chief Medical Officer (CMO) / Chief Health Officer (CHO)
- HR Director or Manager
- Benefits Director of Manager
- Wellness Manager or Coordinator
- Finance Director or Manager
- General Manager
- Office Manager
- A team effort comprised of at least 2 of the above people/job roles

Save

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

Continued

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

Confirmation

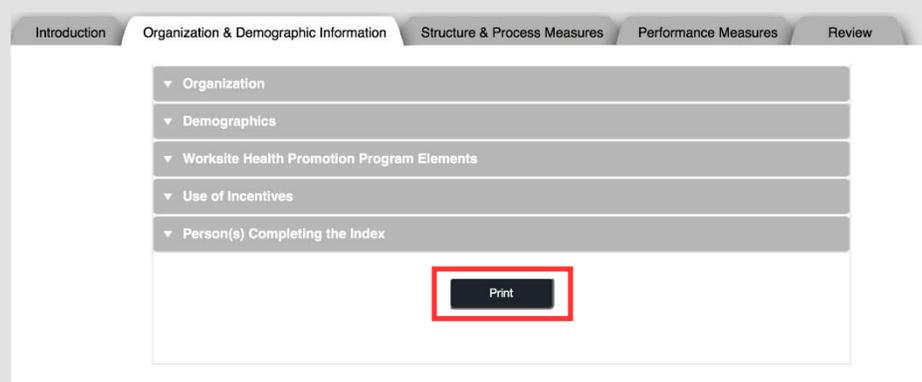
Your changes have been saved.

OK

Confirmation Pop-up

You will return to the **Person(s) Completing the Index** section.

How to Print a Copy of Responses to Section 1

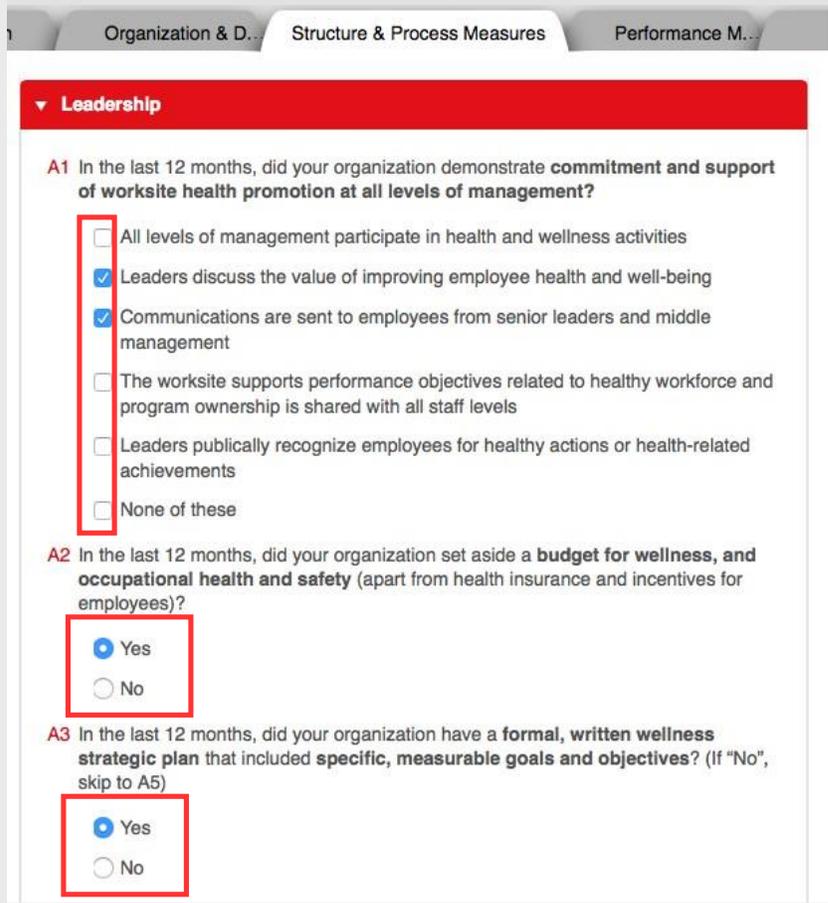
STEPS	SCREEN SHOTS
<ol style="list-style-type: none">1. Scroll to bottom of page.2. Click Print to print Organization & Demographic Information survey.	 A screenshot of a web application interface. At the top, there are five tabs: 'Introduction', 'Organization & Demographic Information', 'Structure & Process Measures', 'Performance Measures', and 'Review'. The 'Organization & Demographic Information' tab is selected. Below the tabs, there is a list of expandable sections: 'Organization', 'Demographics', 'Worksite Health Promotion Program Elements', 'Use of Incentives', and 'Person(s) Completing the Index'. At the bottom right of the main content area, there is a dark grey button labeled 'Print', which is highlighted with a red rectangular box.

Index Screen -- Organization & Demographic Information Tab

Section 2: Structure & Process Measures

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

LEADERSHIP

STEPS	SCREEN SHOTS
<ol style="list-style-type: none">A1 Select all boxes that apply (at least one box must be selected).A2 Select radio button Yes or No.A3 Select radio button Yes or No. (If No continue to A5).	 <p>The screenshot displays the 'Leadership' section of the 'Structure & Process Measures' tab. It contains three questions:</p> <ul style="list-style-type: none">A1 In the last 12 months, did your organization demonstrate commitment and support of worksite health promotion at all levels of management?<ul style="list-style-type: none"><input type="checkbox"/> All levels of management participate in health and wellness activities<input checked="" type="checkbox"/> Leaders discuss the value of improving employee health and well-being<input checked="" type="checkbox"/> Communications are sent to employees from senior leaders and middle management<input type="checkbox"/> The worksite supports performance objectives related to healthy workforce and program ownership is shared with all staff levels<input type="checkbox"/> Leaders publically recognize employees for healthy actions or health-related achievements<input type="checkbox"/> None of theseA2 In the last 12 months, did your organization set aside a budget for wellness, and occupational health and safety (apart from health insurance and incentives for employees)?<ul style="list-style-type: none"><input checked="" type="radio"/> Yes<input type="radio"/> NoA3 In the last 12 months, did your organization have a formal, written wellness strategic plan that included specific, measurable goals and objectives? (If "No", skip to A5)<ul style="list-style-type: none"><input checked="" type="radio"/> Yes<input type="radio"/> No

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.

A4 In the last 12 months, did your organization support the **implementation** of the strategic wellness plan through any of the methods listed below?

- Middle managers and supervisors are made aware of the plan
- Middle managers and supervisors are held accountable for meeting the objectives of the wellness plan goals
- The plan is shared with all employees
- Your company has a system for recognition and awards for meeting wellness plan goals.
- None of these

A5 In the last 12 months, did your organization have a **paid health promotion coordinator** whose job (either part-time or full-time) is to implement a worksite health promotion program?

- >50% Full Time Equivalent
- < 50% Full Time Equivalent
- No

A6 In the last 12 months, did your organization show support for allocating additional head count towards operationalizing your organization's worksite health promotion program?

- Yes
- No

Save

Structure & Process Measures Tab -- Leadership

Continued

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

Confirmation

Your changes have been saved.

OK

Confirmation Pop-up

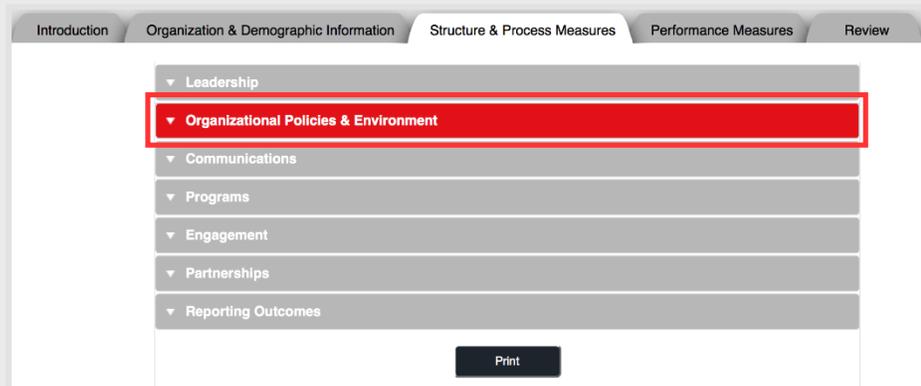
You will return to the **Leadership** section.

ORGANIZATIONAL POLICIES & ENVIRONMENT

STEPS

SCREEN SHOTS

1. Click **Organizational Policies & Environment** accordion bar to open.



Structure & Process Measures Tab

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

STEPS

SCREEN SHOTS

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).

Organization & Demographic Information | Structure & Process Measures | Performance Measures | Review

Leadership

Organizational Policies & Environment

B1 In the last 12 months, did your organization **actively enforce written policies** in any of the following areas?

- Occupational health and safety
- Provision of medical benefits for full-time employees
- Making workplace health and well-being programs available to dependents
- Drug abuse (substance abuse) policy
- Alcohol abuse (substance abuse) policy
- Employee assistance program (EAP) access for counseling and intervention for those already high risk
- Mental well-being and stress management
- Flexible working schedule and/or working remotely
- Vaccinations and other preventive screenings
- Vehicle safety
- None of these

B2 In the last 12 months, did your organization **conduct employee health risk appraisals/assessments (HRAs)** through vendors, onsite staff, or health plans?

Yes

No

In the last 12 months, did your organization **provide individual feedback with health education** that support action plans to address employee health risks through any of the methods listed below?

- Written reports (sent by email or letter)
- One-on-one counseling - online
- One-on-one counseling - telephonic
- One-on-one counseling - in-person

B3 In the last 12 months, did your organization have an active health promotion committee that advocates and supports the health promotion program with any of the following criteria?

Yes

No

- Meets at a pre-determined frequency
- Is responsible for helping determine company wellness policy
- Is accountable to the C-suite

Structure & Process Measures Tab – Organizational Policies & Environment

Continued

4. **B4** Select radio button **Yes** or **No**.
5. **B5** Select radio button **Yes** or **No**.
6. **B6** Select radio button **Yes** or **No**.

B4 In the last 12 months, did your organization have **active internal champions** who advocate and support the health promotion program?

Yes
 No

B5 Tobacco Policy. In the last 12 months, did your organization adhere to and enforce a tobacco-free policy that applies to employees **and** non-employee visitors banning the use and sales of all tobacco products (including but not limited to cigarettes, cigars, smokeless tobacco products and e-cigarettes) **within the enclosed areas on the company premises** (including buildings and vehicles owned, leased (to the extent possible), or operated by the organization with no exception to common work areas, auditoriums, classrooms, conference/meeting rooms, elevators, cafeterias, stairwells, hallways, restrooms, break rooms, garages, warehouse, or all other enclosed facilities)?

Yes
 No

B6 Tobacco Policy. In the last 12 months, did your organization inform employees of the policy through the **organizational policy manual**, and inform visitors and contractors through clearly-posted signs?

Yes
 No

Structure & Process Measures Tab – Organizational Policies & Environment

Continued

7. **B7** Select radio button **Yes** or **No**.
8. **B8** Select radio button **Yes** or **No**.

B7 Tobacco Policy. In the last 12 months, did your organization provide **adequate tobacco cessation coverage as it is defined by the US Department of Labor**, i.e. offering the following services **without any cost sharing**: (1) screen for tobacco use and; (2) offer two cessation attempts each for those who smoke? Coverage for a cessation attempt is defined as four tobacco counselling sessions of at least 10 minutes each (whether telephone, individual, or group), and all FDA-approved tobacco medications for a 90-day treatment regimen when prescribed by a healthcare provider without prior authorization.

Yes
 No

B8 Tobacco Policy. In the last 12 months, did your organization refer tobacco users to a state or other tobacco cessation telephone quit line?

Yes
 No

Structure & Process Measures Tab – Organizational Policies & Environment

Continued

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.

B9 Tobacco Policy. In the last 12 months, did your organization ban the use and sales of all tobacco products including but not limited to cigarettes, cigars, and smokeless tobacco products on all **outside property or grounds owned or wholly leased by the organization** (including work areas, construction sites, temporary offices, trailers, restrooms, vehicles, and parking lots. This also applies to private vehicles while they are on the organization’s property)?

Yes
 No

B10 Tobacco Policy. In the last 12 months, did your organization designate an outdoor smoking area at the discretion of the organization’s management, designate an outdoor smoking area for employees to use on breaks that is located at least 25 feet from worksite entrances and building air intake ducts with appropriate and regularly-cleaned disposal containers?

Yes
 No

Structure & Process Measures Tab – Organizational Policies & Environment

Continued

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](#)).

B11 Nutrition Policy. Pledge: Did your organization sign the American Heart Association’s Food and Beverage Pledge Letter committing to a Healthier Workplace by Building a Culture of Health? ([See Healthy Workplace Food & Beverage Pledge](#))

Yes
 No

B12 Nutrition Policy. General: In the last 12 months, did your organization implement a written policy and supporting internal communication efforts that make healthier food and beverage choice available in cafeterias, catered meetings, snack bars and vending machines? Answer “yes” if, for example, the policy or formal communication makes vegetables, fruits, 100% fruit juices, whole grain items, snacks limited in sodium and added sugars available in cafeterias or snack bars.

Yes
 No

B13 Nutrition Policy. Beverages: In the last 12 months, did your organization implement a plan to offer at least 50% healthy beverage choices throughout the workplace, including vending, catered meals, snack bars, and cafeterias, with a plan to eliminate full calorie sugar sweetened beverages in the worksite? Answer ‘yes’ if the policy meets the American Heart Association’s Healthy Workplace nutrition standard for beverages. ([See Healthy Workplace Food & Beverage Toolkit](#))

Yes
 No

B14 Nutrition Policy. Vending/Snack Foods: In the last 12 months, did your organization offer a minimum of 25% of healthier options, with a plan to annually improve this percentage, in vending machine and other snack choices available at cafeterias, meetings, catered meetings or snack bars? Answer ‘yes’ if the healthier options meet the American Heart Association’s recommended nutrition criteria and selections that support a healthy diet pattern. ([See Healthy Workplace Food & Beverage Toolkit - Guidance on Vending Machines](#))

Yes
 No

Structure & Process Measures Tab – Organizational Policies & Environment

Continued

- 15. **B15** Select radio button **Yes** or **No**. ([See Healthy Workplace Food & Beverage Toolkit](#)).
- 16. **B16** Select radio button **Yes** or **No**.

B15 Nutrition Policy. Catered Meals (On- and Off-Site Meals/Events): In the last 12 months, did your organization offer catered meals (breakfast, lunch or dinner) in cafeterias, on- or off-site meetings, and other meals served at worksite align with American Heart Association recommendations for heart-healthy diet? Answer "yes" if foods served at meals are consistent with a healthy dietary pattern, which promotes consumption of fruits, vegetables, whole grains, nonfat and low-fat dairy, fish, skinless poultry, legumes and nuts, and limits consumption of sodium, saturated and trans fats, added sugars and limits and ultimately excludes sugar-sweetened beverages. ([See Healthy Workplace Food & Beverage Toolkit](#))

Yes
 No

B16 Nutrition Policy. Nutritional Information: In the last 12 months, did your organization post nutritional information and menu labeling on sodium, calories, and added sugars for foods and beverages sold in worksite cafeterias, snack bars, vending machines, catered meals, or other purchase points? Answer "yes" if nutrition facts panel information is posted on vending machines and menu labeling is posted in cafeterias.

Yes
 No

Structure & Process Measures Tab – Organizational Policies & Environment

Continued

- 17. **B17** Select radio button **Yes** or **No**.
- 18. **B18** Select radio button **Yes** or **No**.
- 19. **B19** Select radio button **Yes** or **No**.

B17 Physical Activity Policy. In the last 12 months, did your organization offer and promote the use of **recreation/ fitness facilities or gym/health club memberships** that are either onsite/free or offsite/with membership reimbursed or discounted?

Yes
 No

B18 Physical Activity Policy. In the last 12 months, did your organization offer and promote various onsite or offsite **physical activity classes** (e.g. aerobics, yoga), which could be free or at a cost to the employee?

Yes
 No

B19 Physical Activity Policy. In the last 12 months, did managers allow employees (full-time and hourly) **time during the day** to engage in physical activity?

Yes
 No

Structure & Process Measures Tab – Organizational Policies & Environment

Continued

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.

B20 Physical Activity Policy. In the last 12 months, did your organization provide and promote a **supportive environment** for physical activity, recreation or exercise through any of the following options?

- Indoor/outdoor walking/jogging tracks or trails
- Maps of suitable walking routes
- Bicycle racks
- Open-space designated for recreation
- Safe, well-lit, accessible stairwells identified with posted point-of-decision signs
- Shower and/or changing facility and/or locker room
- Public transportation access and use
- Walking meetings
- None of these

B21 Healthy Design Policy. In the last 12 months, did your organization implement components of **healthy design** in your workplace?

- Adjustable/standing desks
- Proper air/ventilation
- Adequate kitchen space that allows for the preparation of meals on-site
- Cafeteria architecture promotes healthy options
- Ready access to windows
- None of these

B22 Lactation Policy. In the last 12 months, did your organization demonstrate support for breastfeeding mothers by implementing any of the policies listed below?

- Have a written policy on breastfeeding for employees
- Breastfeeding mothers are provided access to a private room for breastfeeding or pumping other than a bathroom, with appropriate seating and privacy
- Enough refrigerator and/or freezer space is available to allow all breastfeeding mothers to store expressed breast milk
- Provide flexible paid or unpaid break times to allow mothers to pump breast milk
- None of these

Save

Structure & Process Measures Tab – Organizational Policies & Environment

Continued

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

Confirmation

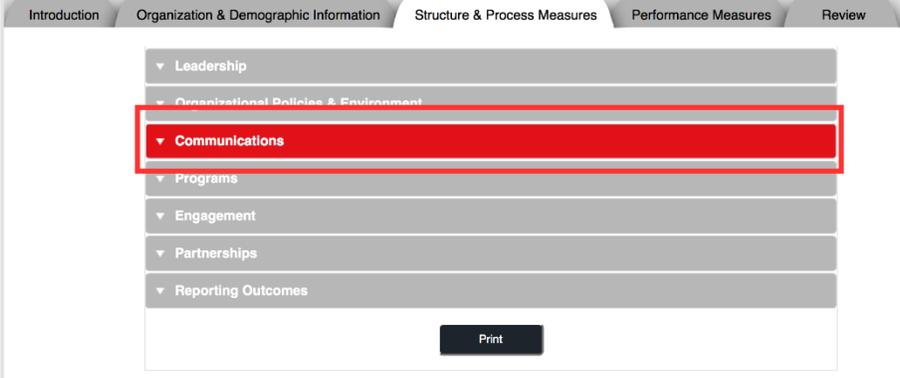
Your changes have been saved.

OK

Confirmation Pop-up

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

COMMUNICATIONS

STEPS	SCREEN SHOTS
1. Click Communications section to open.	 <p>The screenshot shows a navigation menu with five tabs: Introduction, Organization & Demographic Information, Structure & Process Measures (selected), Performance Measures, and Review. Below the tabs is a list of categories: Leadership, Organizational Policies & Environment, Communications (highlighted in red), Programs, Engagement, Partnerships, and Reporting Outcomes. A 'Print' button is located at the bottom right of the list.</p>

Structure & Process Measures Tab

The **Communications** section will expand.

STEPS **SCREEN SHOTS**

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**.

Organization & Demographic Information | Structure & Process Measures | Performance Measures | Review

Leadership

Organizational Policies & Environment

Communications

C1 In the last 12 months, did your organization have a **formal, written** communication plan for internal wellness communications going out to all staff from senior leadership?

Yes
 No

C2 In the last 12 months, thinking about your wellness communication plan, did your organization **identify your employees for targeted communications** based on demographics (age, gender, race/ethnicity, health literacy, type of worker), or cultural/language preferences?

Yes
 No

C3 In the last 12 months, did your organization promote and market health promotion programs to employees using your company brand name/logo, using multiple channels or communication?

Use the company brand / logo
 Use multiple channels of communications (print, email, web, social media)
 Neither of these

C4 In the last 12 months, did your organization **evaluate the impact and effectiveness of the communications plan**?

Yes
 No

Structure & Process Measures Tab – Communications

Continued

5. **C5** Select radio button **Yes** or **No**.
6. **C6** Select radio button **Annually**, **Quarterly**, or **Monthly**.
7. Click **Save** button.

C5 In the last 12 months, did your organization, include employee input in the design of health promotion programs and communications?

Yes

No

C6 In the last 12 months, did your organization regularly communicate about major health risk behaviors such as tobacco use, healthy diet and physical activity?

Annually

Quarterly

Monthly

Save

Structure & Process Measures Tab – Communications

Continued

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

Confirmation

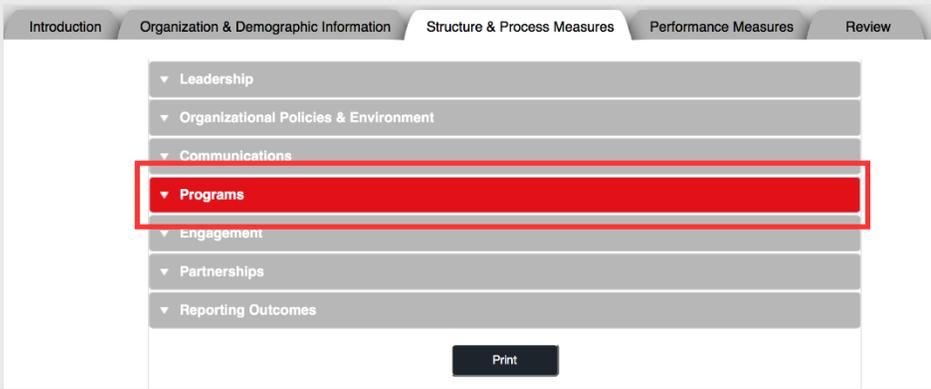
Your changes have been saved.

OK

Confirmation Pop-up

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

PROGRAMS

STEPS	SCREEN SHOTS
1. Click Programs section to open.	 <p>The screenshot shows a navigation menu with tabs: Introduction, Organization & Demographic Information, Structure & Process Measures (selected), Performance Measures, and Review. Under the 'Structure & Process Measures' tab, a list of sections is displayed: Leadership, Organizational Policies & Environment, Communications, Programs (highlighted with a red box), Engagement, Partnerships, and Reporting Outcomes. A 'Print' button is visible at the bottom of the list.</p>

Structure & Process Measures Tab

The **Programs** section will expand.

STEPS

SCREEN SHOTS

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).

Organization & Demographic Information Structure & Process Measures Performance Measures Review

▼ Leadership

▼ Organizational Policies & Environment

▼ Communications

▼ Programs

D1 Screening. In the last 12 months, did your organization provide screening tools/risk factor assessment and feedback, with follow-up and clinical referral when appropriate for the following health risk measures?

Life's Simple Seven (LS7):

- Tobacco Cessation
- Nutrition and Healthy Eating
- Physical Activity
- Weight Management
- Blood Pressure
- Cholesterol
- Diabetes

Other:

- Alcohol or drug abuse
- Depression
- Stress Management
- Sleep
- None of these

D2 Print / Online Materials. In the last 12 months, did your organization provide brochures, videos, posters, pamphlets, newsletters, or other written or online information that address the following health risks measurements?

Life's Simple Seven (LS7):

- Tobacco Cessation
- Nutrition and Healthy Eating
- Physical Activity
- Weight Management
- Blood Pressure
- Cholesterol
- Diabetes

Other:

- Alcohol or drug abuse
- Depression
- Stress Management
- Sleep
- None of these

Structure & Process Measures Tab – Programs

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).

D3 Workshops. In the last 12 months, did your organization provide educational seminars, webinars, workshops, or classes on the following health risk measurements?

Life's Simple Seven (LS7):

- Tobacco Cessation
- Nutrition and Healthy Eating
- Physical Activity
- Weight Management
- Blood Pressure
- Cholesterol
- Diabetes

Other:

- Alcohol or drug abuse
- Depression
- Stress Management
- Sleep
- None of these

D4 Lifestyle Counselling. In the last 12 months, did your organization provide free or subsidized one-on-one or group lifestyle counseling (whether online, telephonically, or in-person) and follow-up monitoring for employees on the following health risk measurements?

Life's Simple Seven (LS7):

- Tobacco Cessation
- Nutrition and Healthy Eating
- Physical Activity
- Weight Management
- Blood Pressure
- Cholesterol
- Diabetes

Other:

- Alcohol or drug abuse
- Depression
- Stress Management
- Sleep
- None of these

Structure & Process Measures Tab – Programs

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**.

D5 Disease Management. In the last 12 months, did your organization provide a disease management (DM) program (including lifestyle management) through your health plan or a vendor to address the following diseases or health conditions?

- Obesity
- Diabetes
- Hypertension
- Metabolic syndrome
- Congestive heart failure (CHF)
- Coronary artery disease (CAD)
- Chronic obstructive pulmonary disease (COPD)
- Musculoskeletal disorder (including back pain)
- Depression
- Arthritis
- Asthma
- Autoimmune disorders
- Cancer
- None of these

D6 Maternity Program. In the last 12 months, did your organization provide a lifestyle program for new mothers?

Yes
 No

D7 Heart Attack & Stroke. In the last 12 months, did your organization provide information identifying the signs, symptoms, and need for emergency response to stroke, heart attack, and cardiac arrest through posters or flyers in the common areas of your worksite (such as bulletin boards, kiosks, break rooms), emails, newsletters, management communications, websites, seminars, or classes?

Yes
 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.

D8 Heart Attack & Stroke. In the last 12 months, did your organization have an emergency response plan, which includes an emergency response team that addresses acute heart attack and stroke events?

Yes
 No

D9 Heart Attack & Stroke. In the last 12 months, did your organization have a policy that requires an adequate number of employees per floor, work unit, or shift, in accordance with pertinent state and federal laws, to be certified in Cardiopulmonary Resuscitation (CPR) including Automated External Defibrillator (AED) through a nationally-recognized training course?

Yes
 No

D10 Heart Attack & Stroke. In the last 12 months, did your organization have an adequate number of AED units in place such that a person can be reached within 3-5 minutes of collapse?

Yes
 No

Save

Structure & Process Measures Tab – Programs

Continued

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

Confirmation

Your changes have been saved.

OK

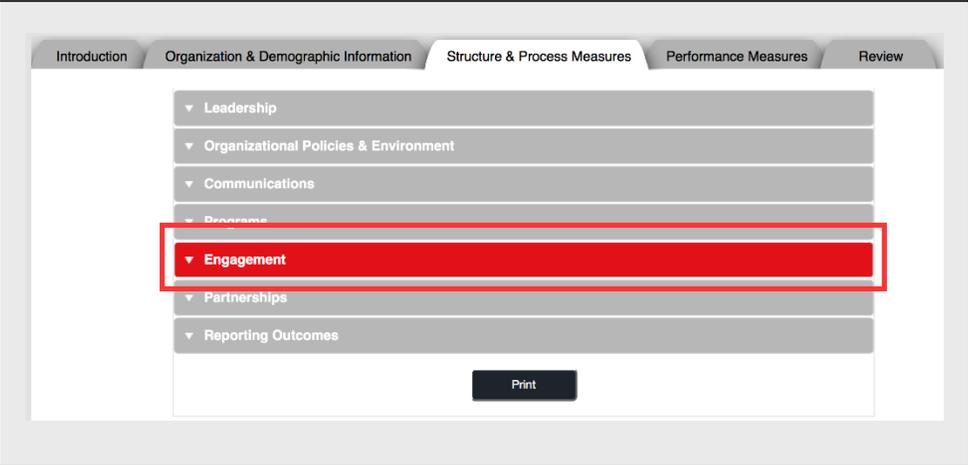
Confirmation Pop-up

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

ENGAGEMENT

STEPS SCREEN SHOTS

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



Structure & Process Measures Tab

The **Engagement** section will expand.

STEPS

SCREEN SHOTS

1. **E1** Select radio button **Yes** or **No**.
2. **E2** Select radio button **Yes** or **No**. If No continue to **E3**, if Yes, select radio button **Yes** or **No** for the subquestion.

The screenshot displays the 'Structure & Process Measures' tab of the Workplace Health Achievement Index. The 'Engagement' section is highlighted in red. It contains three questions (E1, E2, and E3) with radio button options for 'Yes' and 'No'. Red boxes highlight the 'Yes' options for E1 and E2, and the 'No' option for E3.

Organization & Demographic Information | Structure & Process Measures | Performance Measures | Review

Leadership

Organizational Policies & Environment

Communications

Programs

Engagement

E1 In the last 12 months, did your organization **engage the CEO or C-suite to inspire and engage employees around their health** through role modeling? Answer 'yes' if health and wellness messages are communicated directly from the CEO/C-suite and the CEO/C-suite regularly participate in health promotion activities.

Yes
 No

E2 In the last 12 months, did your organization use financial incentives to increase program participation?

Yes
 No

In the last 12 months, did your organization combine financial incentives with other non-financial incentive strategies such as "physical fitness comp time", "flexible spending dollars" or gift certificates to increase participation in health promotion programs?

Yes
 No

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.

E3 In the last 12 months, did your organization engage **spouses or domestic partners** in their health and wellness in any of the ways listed below?

- Provide access to wellness programs
- Provide incentives to participate in programs
- Target communications
- Collect health and wellness data
- None of these

E4 In the last 12 months, did your organization engage **dependents** in their health and wellness in any of the ways listed below?

- Provide access to wellness programs
- Provide incentives to participate in programs
- Target communications
- Collect health and wellness data
- None of these

E5 In the last 12 months, did your organization tailor some health promotion programs and education materials to the **language, literacy levels, and cultural preferences** of the workforce? Answer "no" if you do not perceive a need for your organization to tailor its health promotion programs and education materials to any specific group(s).

Yes
 No

E6 In the last 12 months, did your organization tailor some health promotion programs and education materials to employees' **readiness to change** their health behaviors? Answer 'no' if you do not perceive a need for your organization to tailor its health promotion programs and education materials to any specific group(s).

Yes
 No

Save

Structure & Process Measures Tab – Engagement

Continued

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

Confirmation

Your changes have been saved.

OK

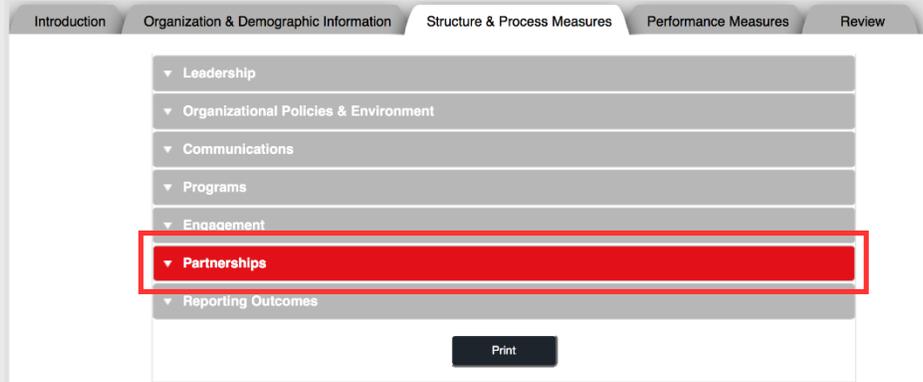
Confirmation Pop-up

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

PARTNERSHIPS

STEPS SCREEN SHOTS

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



Structure & Process Measures Tab -- Leadership

The **Partnerships** section will expand.

STEPS

SCREEN SHOTS

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

Organization & Demographic Information Structure & Process Measures Performance Measures Review

▼ Leadership

▼ Organizational Policies & Environment

▼ Communications

▼ Programs

▼ Engagement

▼ **Partnerships**

F1 In the last 12 months, did your organization actively participate in any community coalitions focused on health, the social and environmental determinants of health (such as racial equality, educational attainment, reducing poverty, improving access to care, addressing residential environments, and so forth) or health outcomes?

Yes

No

Save

Structure & Process Measures Tab – Partnerships

Continued

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

Confirmation

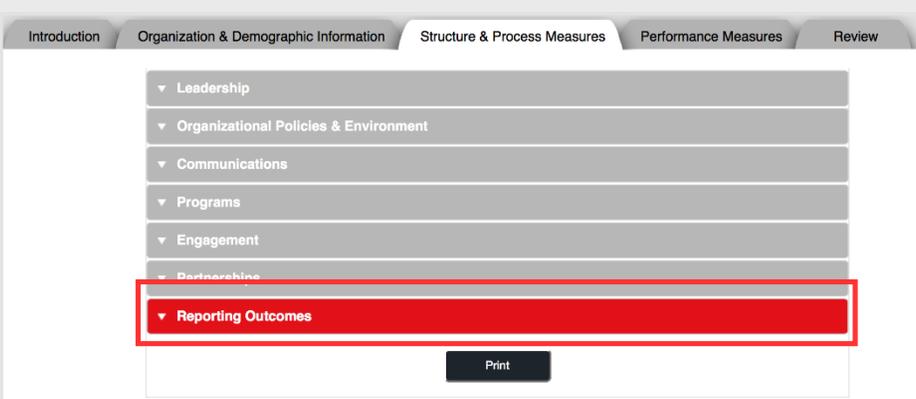
Your changes have been saved.

OK

Confirmation Pop-up

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

REPORTING OUTCOMES

STEPS	SCREEN SHOTS
1. Click Reporting Outcomes section to open.	 <p>The screenshot shows a navigation menu with tabs: Introduction, Organization & Demographic Information, Structure & Process Measures (selected), Performance Measures, and Review. Under the 'Structure & Process Measures' tab, there is a list of sections: Leadership, Organizational Policies & Environment, Communications, Programs, Engagement, Partnerships, and Reporting Outcomes. The 'Reporting Outcomes' section is highlighted with a red border. A 'Print' button is visible below the list.</p>

Structure & Process Measures Tab

The **Reporting Outcomes** section will expand.

STEPS

SCREEN SHOTS

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**.

Organization & Demographic Information Structure & Process Measures Performance Measures Review

▼ Leadership

▼ Organizational Policies & Environment

▼ Communications

▼ Programs

▼ Engagement

▼ Partnerships

▼ Reporting Outcomes

G1 Implementation Data. In the last 12 months, did your organization collect a variety of relevant data to measure your workplace health program implementation?

Overall program participation rates

Employee participation rates for specific programs

Employee satisfaction with programs and activities

None of these

G2 Outcomes Data. In the last 12 months, did your organization collect a variety of relevant data to measure your workplace health program outcomes?

Biometric data

Health risk information

Absenteeism or presenteeism

Workers compensation claims

Health behavior change (including well-being outcomes)

Employee engagement

Healthcare utilization or medical costs

None of these

G3 Program Evaluation. In the last 12 months, did your organization **conduct ongoing, formal evaluations of health promotion programming that use multiple data sources**? Answer 'yes' if, for example, your organization conducts annual evaluations that measure improved knowledge of chronic disease, behavior change, health risk migration, and return on investment, or value on investment.

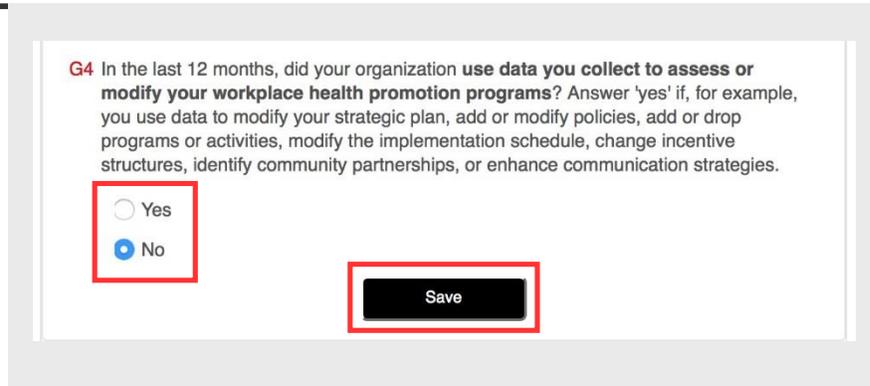
Yes

No

Structure & Process Measures Tab – Reporting Outcomes

Continued

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



G4 In the last 12 months, did your organization **use data you collect to assess or modify your workplace health promotion programs**? Answer 'yes' if, for example, you use data to modify your strategic plan, add or modify policies, add or drop programs or activities, modify the implementation schedule, change incentive structures, identify community partnerships, or enhance communication strategies.

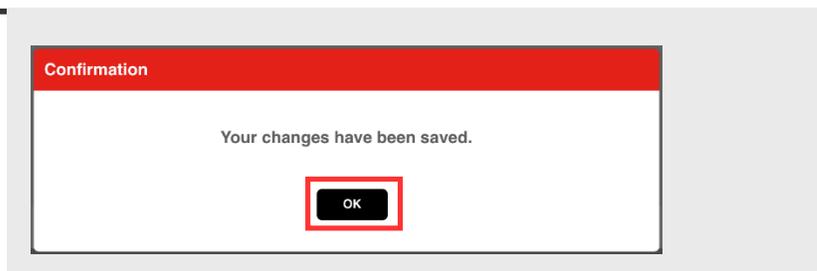
Yes
 No

Save

Structure & Process Measures Tab – Reporting Outcomes

Continued

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



Confirmation

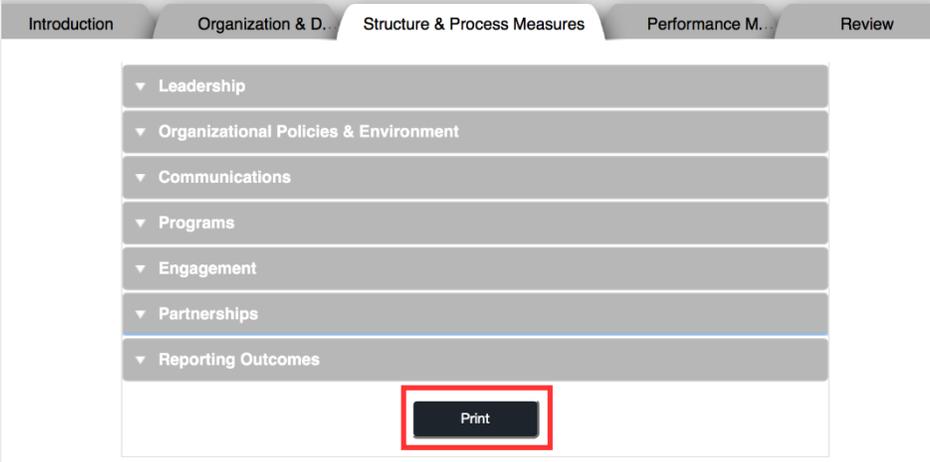
Your changes have been saved.

OK

Confirmation Pop-up

You will return to the **Reporting Outcomes** section.

How to Print a Copy of Answers to Section 2

STEPS	SCREEN SHOTS
<ol style="list-style-type: none">1. Scroll to bottom of page.2. Click Print to print Structure & Process Measures survey.	

Index Screen -- Organization & Demographic Information Tab

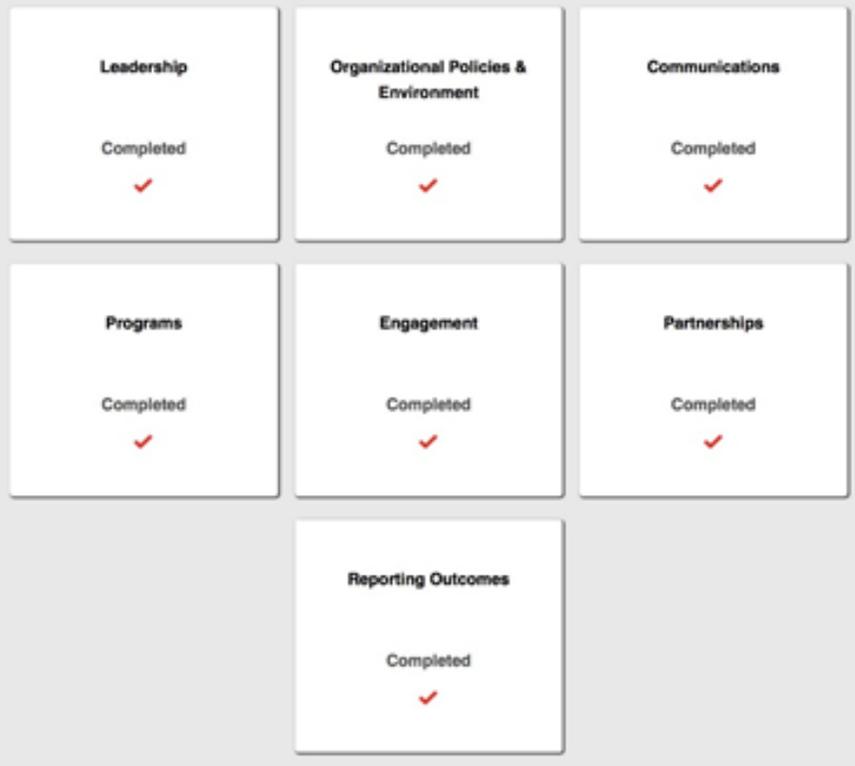
Reviewing Answers to Section 2

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

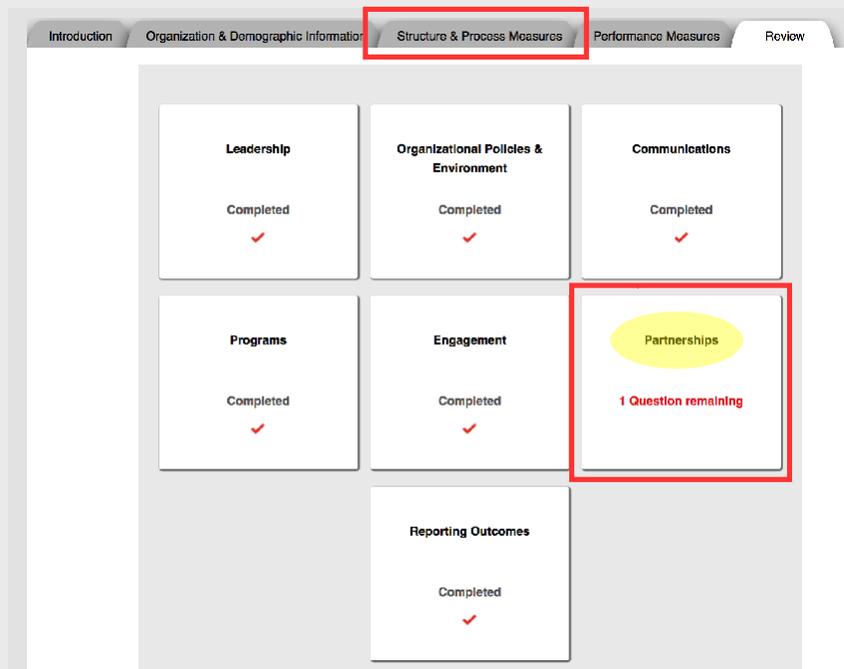
If the user has not completed the required questions in the **Structure & Process Measures** tab, the Index Dashboard will not be available to the user, and the **Review** module will alert the user to the number of questions requiring an answer within each section.

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

STEPS

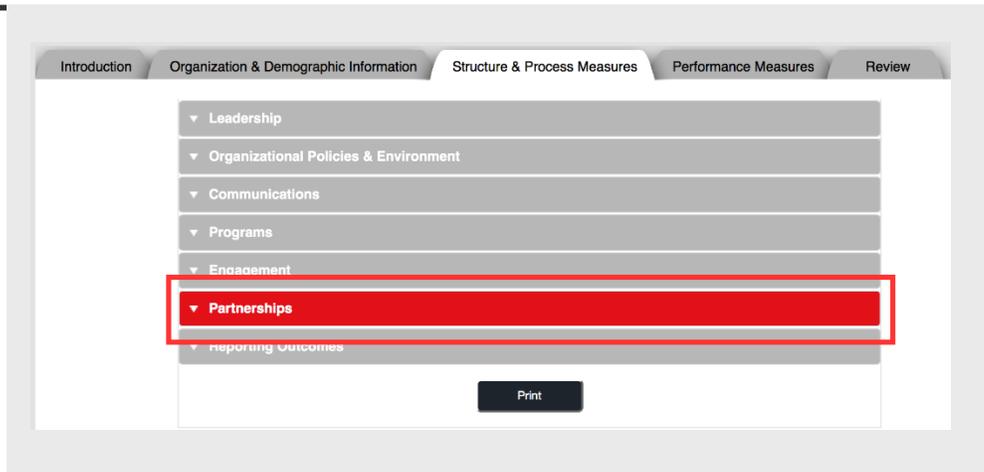
1. Click **Structure & Process Measures** tab.

SCREEN SHOTS



Performance Measures Tab

2. Click the section that was identified as being incomplete.



Structure & Process Measures Tab

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:

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

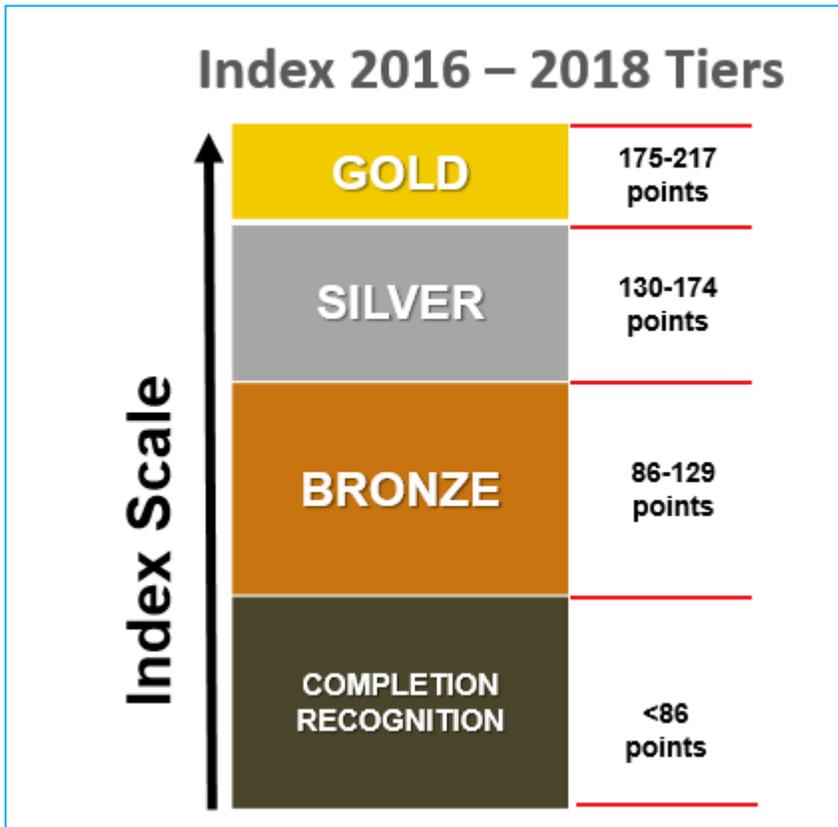
*** Organizations are eligible to receive points for Performance Measure 3 in their second and subsequent years of participation if all data requirements for the Performance Measures were met the previous year.

Organizations that do not qualify 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 Completion recognition based on their Total Index Scores.



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

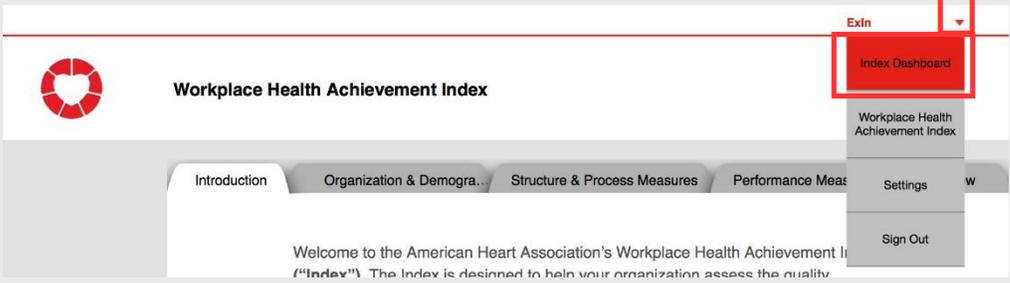
- Digital campaign materials for companies to promote their award on their company website and social media
- A press release template
- Listing on Heart.org
- Recognition certificate, plaque, and window decal

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.

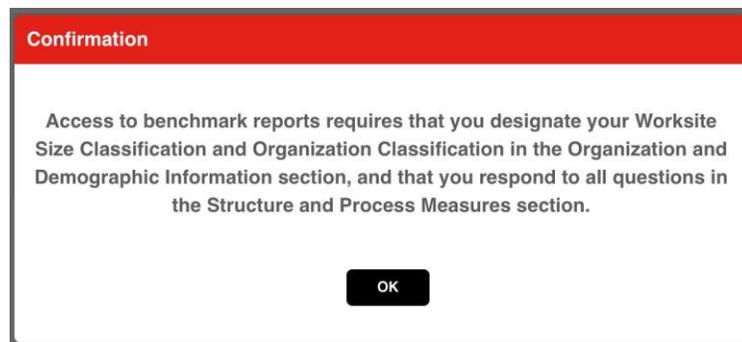
Tip: The initial load of data for the Index Dashboard may take up to 4 hours for data to be displayed.

STEPS	SCREEN SHOTS
<ol style="list-style-type: none">1. Click arrow to access Navigation menu.2. Select Index Dashboard.	

Index Screen -- Introduction Tab

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.



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.

**Workplace Health Achievement Index
User Guide for Enrolling and Completing Sections 1 and 2
Last Updated: Jan 2017
Version 2018_v3**

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.

The screenshot shows the 'Index Dashboard' interface. At the top left, there are logos for the Heart Association and Stroke Association, and the text 'Workplace Health Solutions' and 'life is why'. A user profile 'jessic.lee' is visible in the top right. A callout box points to a navigation dropdown arrow with the text 'Click arrow to access Navigation dropdown'. Another callout box points to the 'Filter data' section, which contains 'Report Filters' for Year (2018), Organization Name (AHA TEST JESSICA), and Worksite (AHA TEST Jessica Lee), along with a 'Search' button. A third callout box points to a 'Download to PDF' button. Below the filters is a 'Download Data' section with a link 'Download your results to PDF.'. On the left, a bar chart titled 'Total Index Score (Max. Score: 217)' shows three bars: 'Your Organization - AHA Test' (107), 'Companies with 750-4999 employees (Average)' (96), and 'Companies within Health Care and Social Assistance (Average)' (102).

Category	Score
Your Organization - AHA Test	107
Companies with 750-4999 employees (Average)	96
Companies within Health Care and Social Assistance (Average)	102

Dashboard Screen

INTERPRETING SCORES

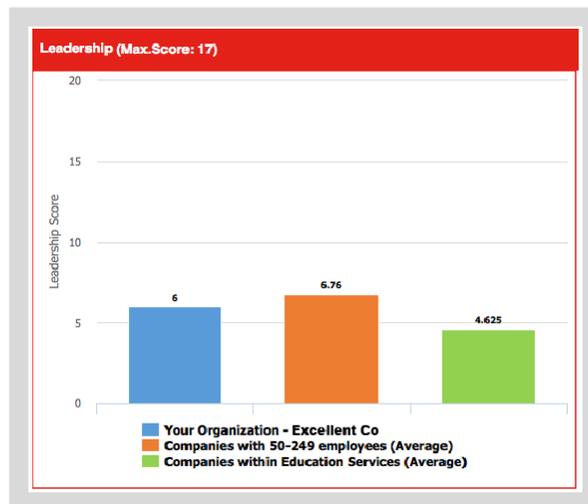
TOTAL INDEX SCORE

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.



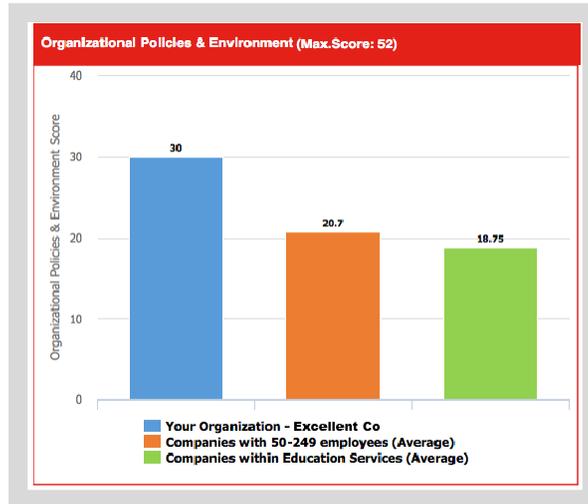
LEADERSHIP

Similarly, this graph shows how your performance compares to peer companies.



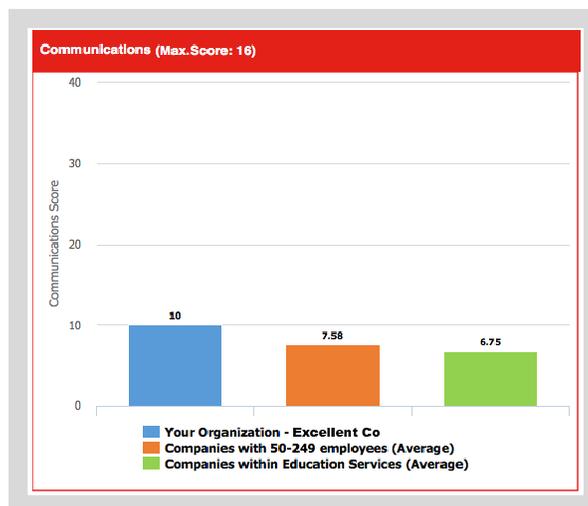
ORGANIZATIONAL POLICIES & ENVIRONMENT

This graph shows how your performance compares to peer companies.



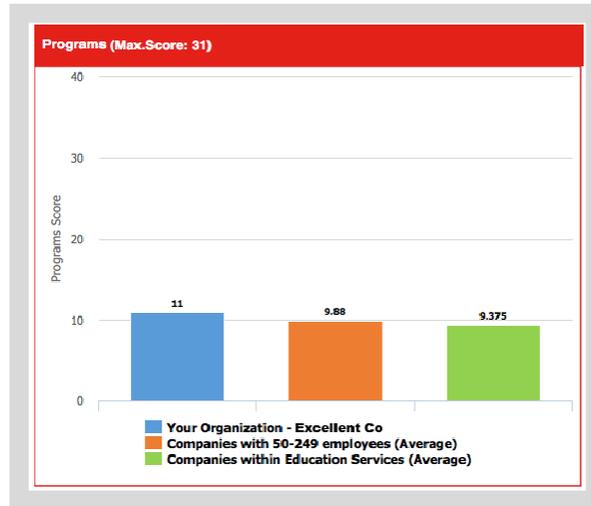
COMMUNICATIONS

This graph shows how your performance compares to peer companies.



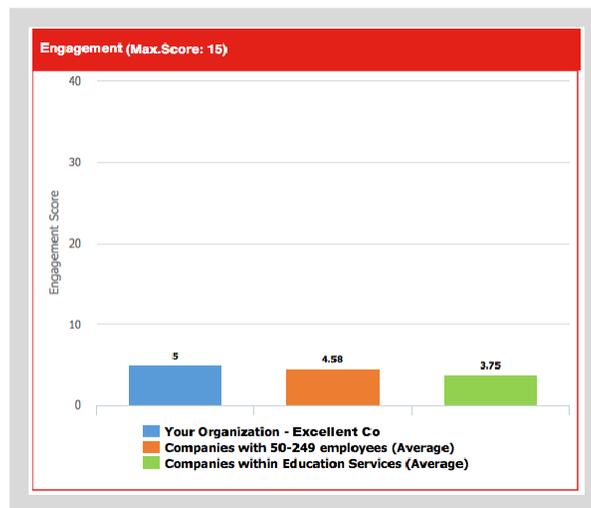
PROGRAMS

This graph shows how your performance compares to peer companies.



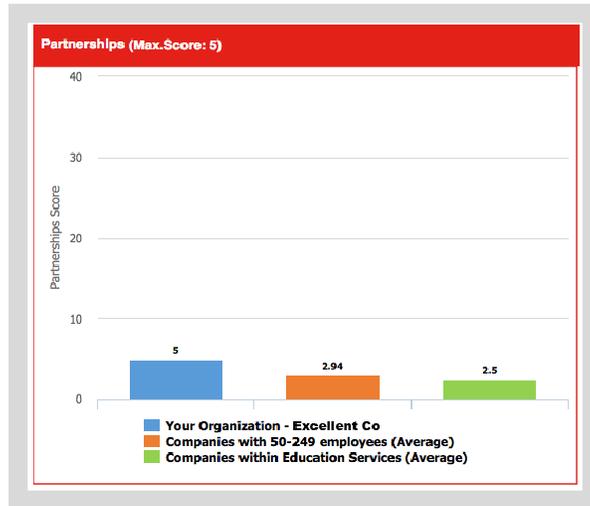
ENGAGEMENT

This graph shows how your performance compares to peer companies.



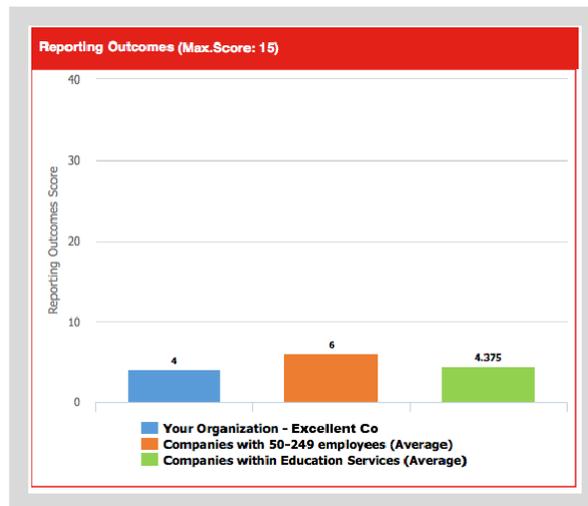
PARTNERSHIPS

This graph shows how your performance compares to peer companies.



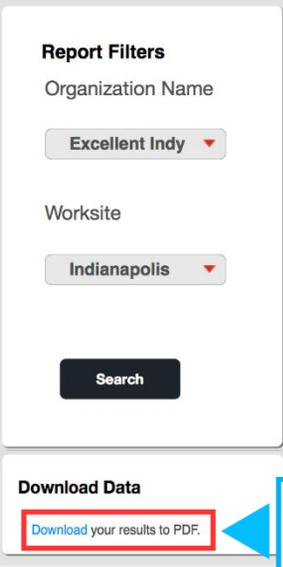
REPORTING OUTCOMES

This graph shows how your performance compares to peer companies.



Downloading a PDF

You can **Download** the reports to **PDF**.

STEPS	SCREEN SHOTS
1. Click Download to download results to PDF .	 <p>The screenshot shows a 'Report Filters' section with two dropdown menus: 'Organization Name' set to 'Excellent Indy' and 'Worksite' set to 'Indianapolis'. Below these is a 'Search' button. Underneath is a 'Download Data' section containing a button labeled 'Download your results to PDF.' A blue callout box with an arrow points to this button, containing the text 'Download PDF of report'.</p>

Dashboard Screen

The report will **Download** to new window.