



**American
Heart
Association®**

**Workplace Health Solutions
Center for Workplace Health Research & Evaluation**

Workplace Health Achievement Index

Aggregate Report Instructions

Version 2018_v4

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Purpose

The purpose of this document is to provide instructions for an **Organization Administrator** to prepare their organization's aggregate employee health data in the appropriate single CSV file format for upload through the Workplace Health Solutions [Index Admin Portal](#). The aggregate CSV file is referred to in this document as the **Aggregate Report**.

Employee health data submitted via the Aggregate Report is used to calculate points for the 3 Index Performance Measures:

Performance Measure #1 – Points awarded for the percent of Life's Simple 7[®] employee health data submitted.

- The percent can range from 0-100%.
- To qualify for points for Performance Measure 1, data must be submitted for at least 25% of employees AND for at least 5 of the 7 Life's Simple 7[®] (LS7) metrics.

Performance measure #2 – Points awarded for the organizational heart health score based on LS7 employee health data.

- Organizational Heart Health Score ranges from 0-10.
- To qualify for points for Performance Measure 2, data must be submitted for at least 25% of employees AND for at least 4 of the 7 LS7 metrics.
- In addition, achieving a minimum Organizational Heart Health Score of 5.2 is required to qualify for points. An Organizational Heart Health Score under 5.2 will receive 0 points even if Performance Measure 2 requirements are met for data submitted for at least 25% for employees and for at least 4 out of 7 LS7 metrics.

Performance Measure #3 – Points awarded for the year-to-year percent improvement in Organizational Heart Health Score

- Organizations are eligible to receive points for this measure in their second and subsequent years of participation.
- To qualify for points for Performance Measure 3, data must be submitted for at least 25% of employees AND for at least 4 of the 7 LS7 metrics.

For more information, refer to the document: *Choosing a Method for Submitting Employee Health Data for the 3 Index Performance Measures*

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 processed on time if using Aggregate or Batch processes, we recommend completing the Index 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.

Data Privacy

All data submitted via the [Index Admin Portal](#) is stored and processed in a secure certified HIPAA compliant, third-party database, CloudMine.

For more information regarding AHA's data privacy policy, visit:

- [Terms & Conditions for Use with Workplace Health Achievement Index](#) (with optional My Life Check® Assessment) • [American Heart Association's Privacy Policy](#)

About LS7 Metrics

Employee health data submitted for an organization is based on LS7 metrics, the American Heart Association’s scientifically validated definition of ideal heart health.

LS7 7 comprises of 3 modifiable behaviors: And 4 biometric measures:

- Living tobacco-free • Maintaining a healthy weight
- Being physically active • Managing blood pressure
- Eating healthy • Controlling cholesterol
- Reducing blood sugar

These metrics are classified into 3 clinical strata: poor, intermediate, and ideal. Table 1. below describes each metric.

Life’s Simple 7 [®]	Poor	Intermediate	Ideal
Smoking Status*	Current smoker	Former ≤ 12 months	Never or Quit > 12 months
	Current smoker	-----	Not currently smoking
Physical Activity	0 min/week	1-149 min/week moderate or 1-74 min/week vigorous or 1-149 min/week of total activity	150+ min/week moderate or 75+ min/week vigorous or 150+ min/week of total activity
Healthy Diet	0 - < 2.5 servings of fruits and vegetables a day	2.5 - < 4.5 servings of fruits and vegetables a day	≥ 4.5 servings of fruits and vegetables a day
Healthy Weight	<18.5 kg/m ² OR ≥ 30 kg/m ²	25 - < 30 kg/m ²	18.5 - < 25 kg/m ²
Fasting Blood Glucose or Hemoglobin A1c [‡]	Fasting Blood Glucose: 126 mg/dL or more A1c: > 6.5%	Fasting Blood Glucose: 100 - < 126 mg/dL A1c: 5.7-6.4%	Fasting Blood Glucose: < 100 mg/dL A1c: < 5.7%
Total Cholesterol	≥ 240 mg/dL	200 - < 240 mg/dL	< 200 mg/dL
Blood Pressure	SBP ≥ 130 mm Hg or DBP ≥ 80 mm Hg	SBP 120 - 129 mm Hg and DBP <80 mm Hg	SBP < 120 mm Hg and DBP < 80 mm Hg

*AHA’s scientifically validated definition of heart health categorizes smoking into 3 clinical strata. However, we allow organizations to report dichotomous values for smoking. Organizations can provide numbers for those who smoke under “poor” and numbers of those who do not smoke, under “ideal.” The “intermediate” can be left blank. This is allowed for two reasons. First, we recognize that smoking is often reported in health risk assessment vendor reports in two categories. Second, data from the 2012 National Health and Nutrition Examination Survey indicates that less than 2% of all US adults fall into the intermediate category.

¥ Either fasting glucose or A1c can be reported. A1c has been added to the assessment, because people with diabetes are more inclined to measure A1c and some companies might also include A1c in their biometric screenings.

Preparing the Aggregate Report

Preparing the Aggregate Report involves calculating the number of employees that fall into the poor, intermediate and ideal categories.

Tips for Preparing the Aggregate Report

- ✓ Keep in mind that **you may need to combine all the relevant data from one or more data sources**. For example, data may come from health risk assessment reports and well as reports from biometric screenings conducted within your organization. Be sure that when combining data sources, the same employee is not included more than once.
- ✓ **Use the Aggregate Report template downloaded through your organization Index admin portal, under the Performance Measures tab.** If you do not see the Aggregate Report Template available for download, contact Technical Assistance (888-242-4503). They will set your account up for using the Aggregate Report.
- ✓ **Do not change the column headings of the Aggregate Report.** This includes not changing formatting of the text and not changing the order in which the columns appear.
- ✓ **Do not include decimal values in the Aggregate Report.** The numbers reported represent employees so decimals are not accepted.
- ✓ **It is fine to leave cells blank, if, and only if, there are zero employees that fall into that category.**
- ✓ In the Aggregate Report, the first column, **“Total Eligible Population”** 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.
- ✓ **Numbers from each LS7 metric should NOT add up to 100% of the Total Eligible Population.** Most organizations will not have 100% of their Total Eligible Population complete their HRA and biometric screening. Therefore, the numbers in the poor, intermediate, and ideal categories for each metric can and most likely should add up to less than the number reported in the Total Eligible Population.

Screenshot of the Aggregate Report Template

There are 22 cells in the Aggregate Report template to fill in. For any cells where the total number is zero, you can enter “0” or leave the cell blank. To enter data, follow the guidelines for each data element.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V
1	Total Eligible Population	Smoking Status (P)	Smoking Status (I)	Physical Activity (P)	Physical Activity (Int)	Physical Activity (I)	Healthy Diet (P)	Healthy Diet (Int)	Healthy Diet (I)	Healthy Weight (P)	Healthy Weight (Int)	Healthy Weight (I)	Blood Pressure (P)	Blood Pressure (Int)	Blood Pressure (I)	Blood Cholesterol (P)	Blood Cholesterol (Int)	Blood Cholesterol (I)	Fasting Blood Glucose (P)	Fasting Blood Glucose (Int)	Fasting Blood Glucose (I)	
2																						

Only aggregate data is entered into the Aggregate Report. Individual level data should not be added. Therefore, **no personal information** (i.e. emails, phone numbers, etc.) should be entered.

Table 2. Data Element Guidelines

Please note the following abbreviations when referring to Table 2.

- P = Poor (as defined below based on LS7)
- Int = Intermediate (as defined below based on LS7)
- I = Ideal (as defined below based on LS7)
- SBP = Systolic Blood Pressure
- DBP = Diastolic Blood Pressure **IMPORTANT:**

For **Total Eligible Population**, enter 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. All counts exclude dependents and spouses eligible to participate.

For **each Life's Simple 7 metric** below, provide the number of employees who participated in the respective assessment. For example, for smoking, enter the number of employees who fall into the "poor", "intermediate", and "ideal" categories as defined. **Note:** Unless your organization has 100% participation for each Life's Simple 7 metric, the total for "poor", "intermediate", and "ideal" for any given metric cannot equal the Total Eligible Population number you provide.

DATA VERIFICATION:

Companies that self-report $\geq 100\%$ participation will be contacted by the Center for Workplace Health Research and Evaluation to query their data submission. Following verification, scores may be changed.

Table 2. Data Element Guidelines for Aggregate Report			
Metric	Data expected	Field details	Remarks
Total Eligible Population	Positive Integer	Mandatory field	Total number of employees eligible for taking a health risk assessment (HRA) <u>and/or</u> eligible for participating in biometric screenings offered by your organization to employees. This value excludes dependents and spouses eligible to participate. Indicate a number: 0 - 999999
Smoking Status (P)	Positive Integer	Voluntary field	Number of employees who are current smokers
Smoking Status (Int.)	Positive Integer	Voluntary field	Number of employees who quit <12 months
Smoking Status (I)	Positive Integer	Voluntary field	Number of employees who have never smoked or quit > 12 months
Physical Activity (P)	Positive Integer	Voluntary field	Number of employees who engage in 0 minutes of moderate or vigorous physical activity a week

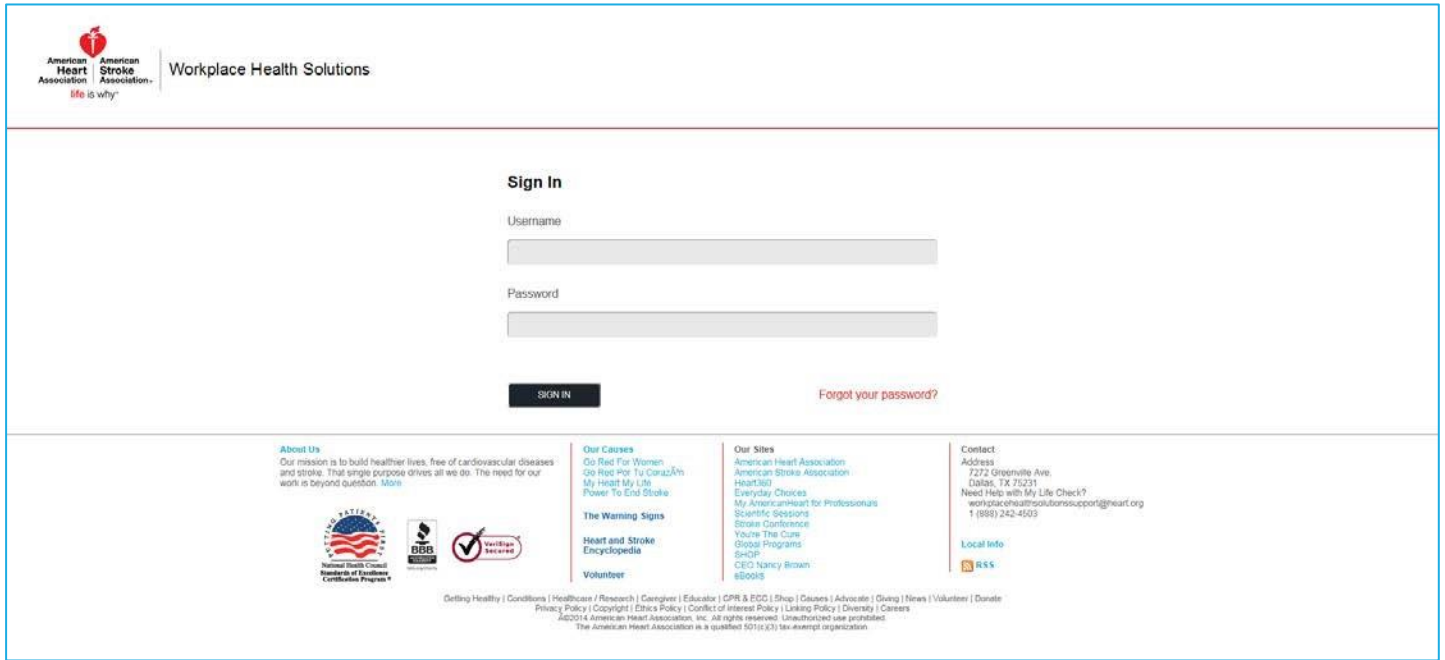
Physical Activity (Int.)	Positive Integer	Voluntary field	Number of employees who engage in 1-149 minutes moderate; or 1-74 minutes vigorous; or 1-149 minutes moderate and vigorous physical activity <u>a week</u>
Physical Activity (I)	Positive Integer	Voluntary field	Number of employees who engage in ≥ 150 minutes moderate; or ≥75 minutes vigorous; ≥ 150 minutes moderate and vigorous physical activity <u>a week</u>
Healthy Diet (P)	Positive Integer	Voluntary field	Number of employees who consume 0 - <2.5 servings of fruits and vegetables <u>a day</u>
Healthy Diet (Int.)	Positive Integer	Voluntary field	Number of employees who consume 2.5 - < 4.5 servings of fruits and vegetables <u>a day</u>
Healthy Diet (I)	Positive Integer	Voluntary field	Number of employees who consume ≥ 4.5 servings of fruits and vegetables <u>a day</u>
Healthy Weight (P)	Positive Integer	Voluntary field	Number of employees with a Body Mass Index (BMI) <18.5 kg/m² OR ≥ 30 kg/m²
Healthy Weight (Int.)	Positive Integer	Voluntary field	Number of employees with a Body Mass Index (BMI) of 25 - < 30 kg/m²
Healthy Weight (I)	Positive Integer	Voluntary field	Number of employees with a Body Mass Index (BMI) 18.5 - < 25 kg/m²
Blood Pressure (P)	Positive Integer	Voluntary field	Number of employees with a SBP ≥ 130 mm Hg or DBP ≥ 80 mm Hg If you have employees that have poor levels of SBP and intermediate or ideal levels of DBP (or vice versa), they should be counted in the Poor category only.
Blood Pressure (Int.)	Positive Integer	Voluntary field	Number of employees with a SBP 120 - 129 mm Hg and DBP < 80 mm Hg If you have employees that have intermediate levels of SBP and ideal levels of DBP (or vice versa), they should be counted in the Intermediate category only.
Blood Pressure (I)	Positive Integer	Voluntary field	Number of employees with a SBP <120 and DBP < 80 mm Hg
Blood Cholesterol (P)	Positive Integer	Voluntary field	Number of employees with ≥ 240 mg/dL

Blood Cholesterol (Int.)	Positive Integer	Voluntary field	Number of employees with 200 - < 240 mg/dL
Table 2. Data Element Guidelines for Aggregate Report			
Blood Cholesterol (I)	Positive Integer	Voluntary field	Number of employees with < 200 mg/dL
Fasting Blood Glucose (P)	Positive Integer	Voluntary field	Number of employees with ≥ 126 mg/dL if reporting Fasting Blood Glucose For reporting A1c, count the number of employees with >6.5%. Please add this count to the column that states Fasting Blood Glucose (P). Report ONLY Fasting Blood Glucose OR A1c count. Do not combine these values.
Fasting Blood Glucose (Int.)	Positive Integer	Voluntary field	Number of employees with 100 - < 126 mg/dL if reporting Fasting Blood Glucose For reporting A1c, count the number of employees with 5.7-6.4% Please add this count to the column that states Fasting Blood Glucose (Int.). Report ONLY Fasting Blood Glucose OR A1c count. Do not combine these values.
Fasting Blood Glucose (I)	Positive Integer	Voluntary field	Number of employees with < 100 mg/dL if reporting Fasting Blood Glucose For reporting A1c, count the number of employees with <5.7 if reporting A1c Report ONLY Fasting Blood Glucose OR A1c count. Do not combine these values.

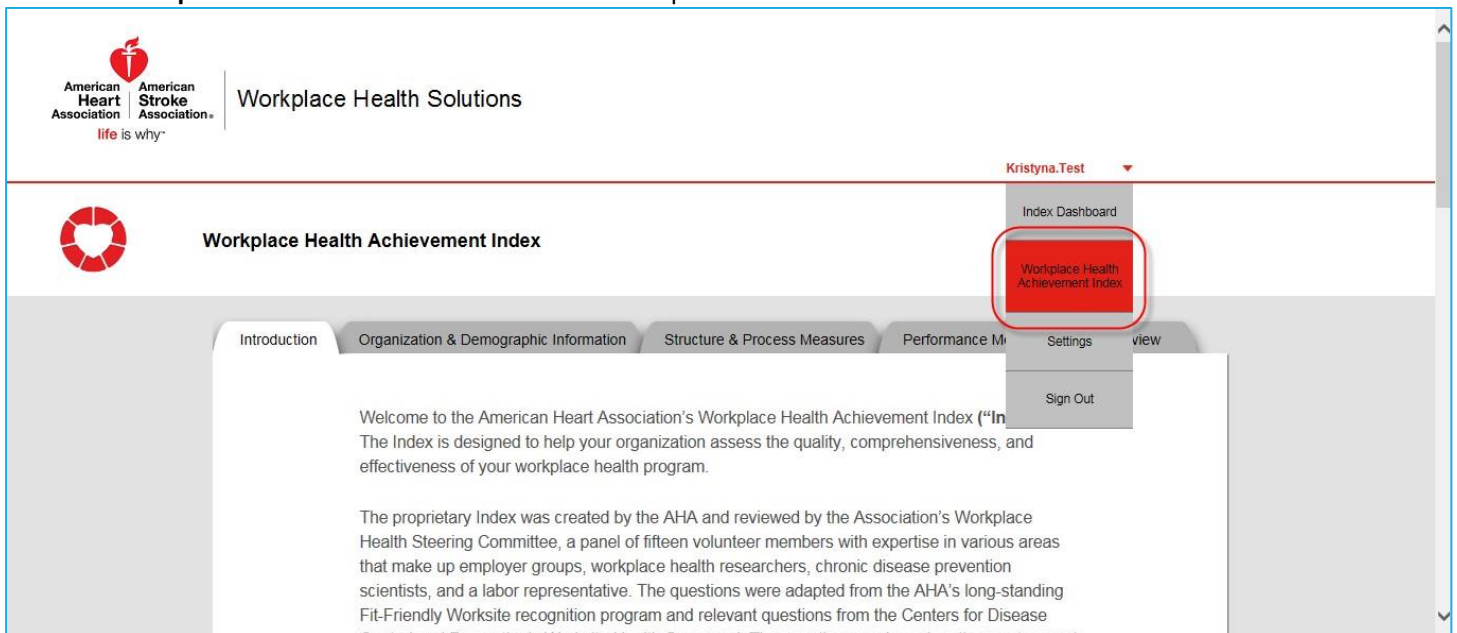
Submitting the Aggregate Report

Follow the steps below to access the Aggregate Report template from your organization [Index Admin Portal](#) and submit it once you have provided your aggregate data.

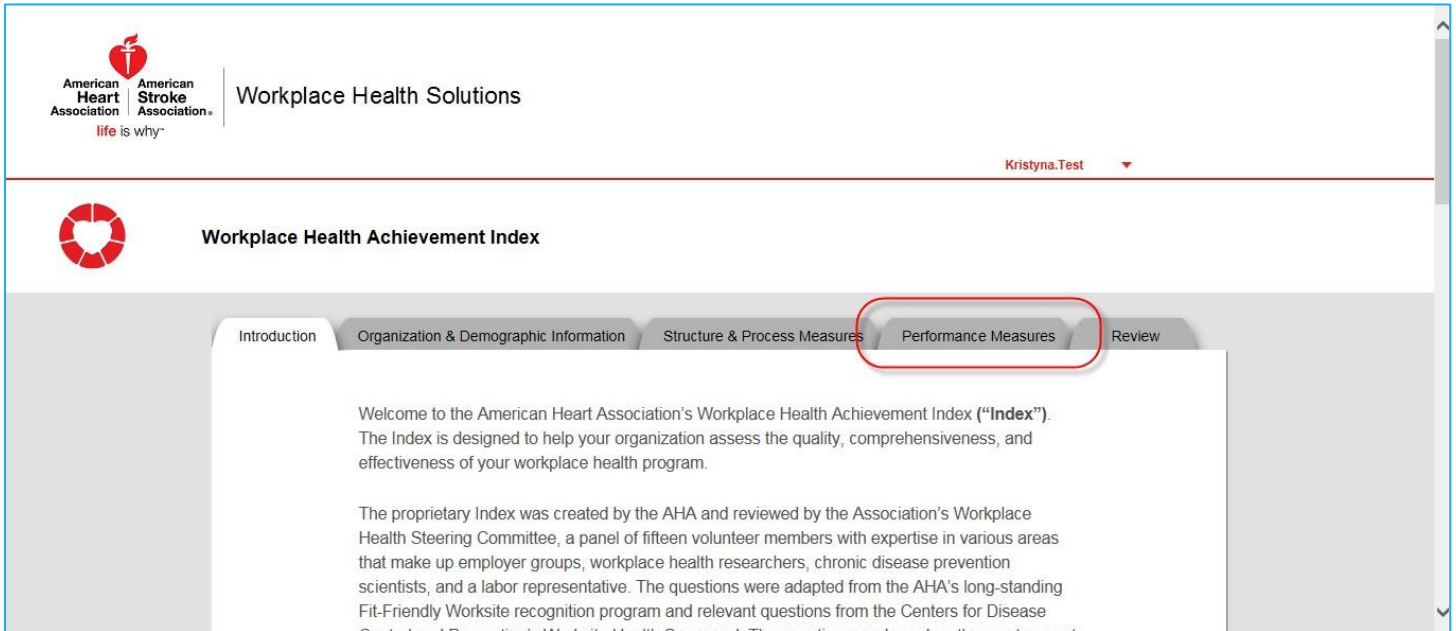
1. Login to the Workplace Health Solutions admin portal <https://whsadmin.heart.org/#/>



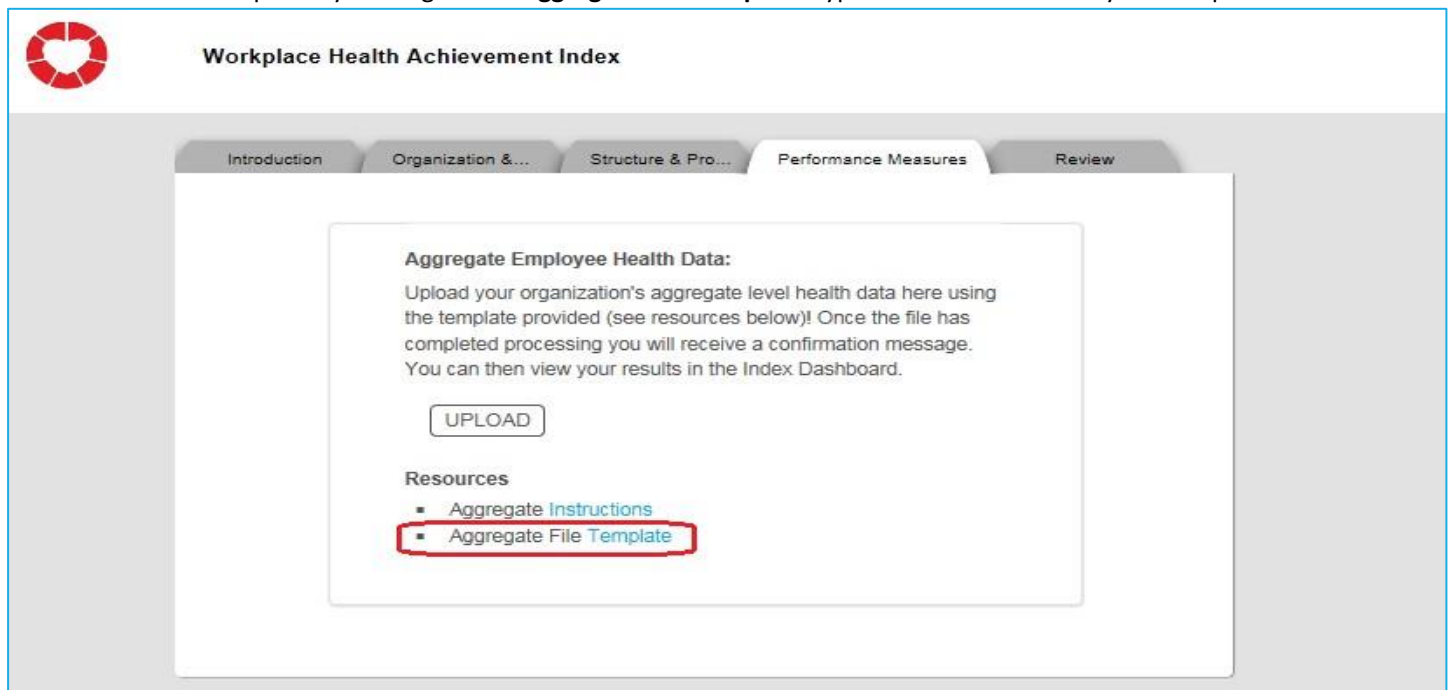
2. Select **Workplace Health Achievement Index** in the drop-down menu



3. Select the **Performance Metrics** tab



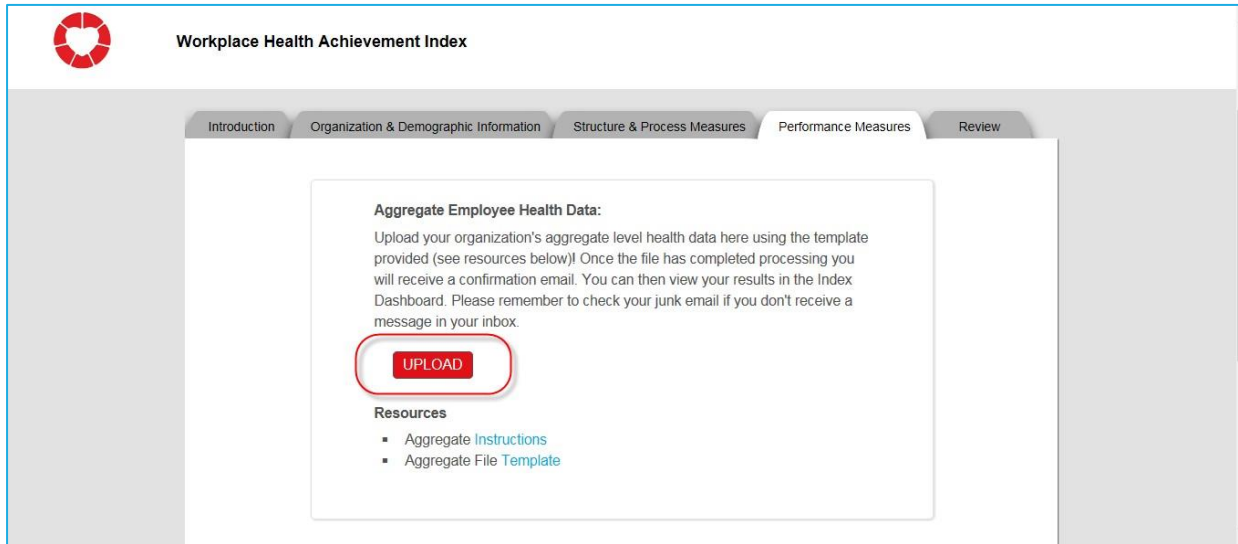
4. Download the template by clicking on the **Aggregate File Template** hyperlink. Save the file to your computer.



Once you have the file downloaded, prepare the file with your data. See the section, “Preparing the Aggregate Report” on pages 5-7 for more information on how to prepare your file with the appropriate data. If you do not see the above screen, please contact workplacehealthsolutionssupport@heart.org or call 888-242-4503 and ask them to select the aggregate report in your account.

To upload a copy of the Aggregate Report template once you have finished preparing it:

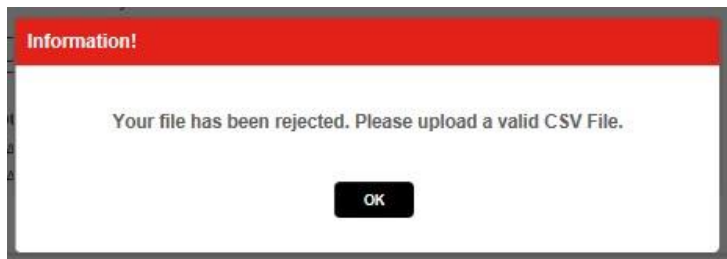
5. Select the **Upload** button



6. Browse for the file on your computer, select the file and click **OK** to complete the upload process

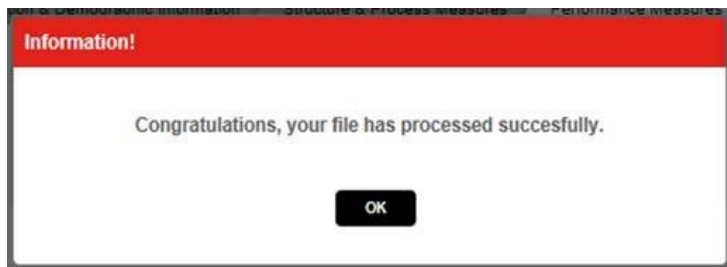
The data in the file will be immediately validated for format and quality.

If the file fails the validation process, an error message will pop up on the screen:



This will happen if, for example, you enter decimal values or change column headings. If this occurs, download a fresh, blank template and fill in your values again. Then, try to upload again.

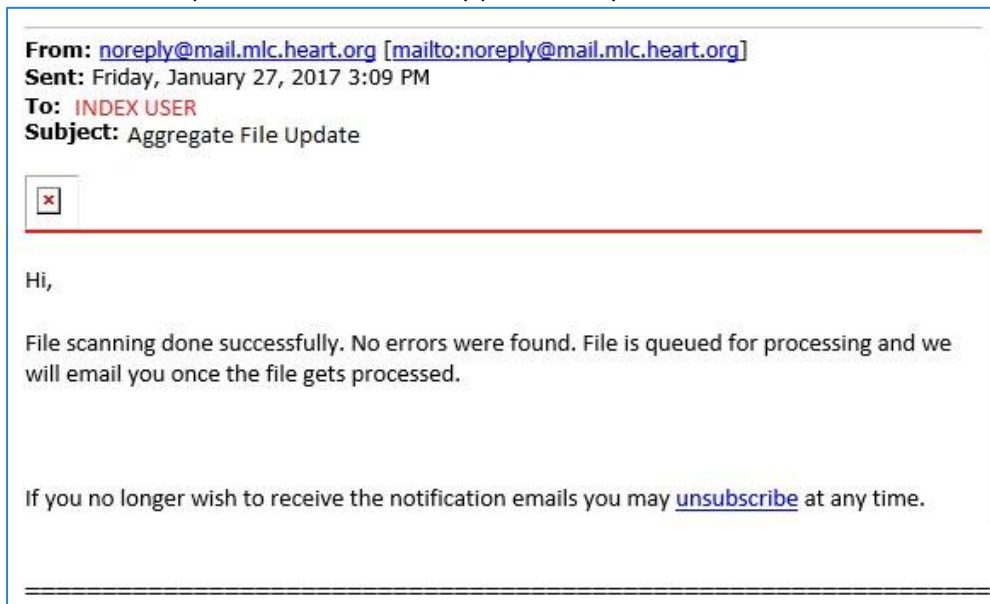
If the file passes the validation process, a success message will pop up on the screen:



Note that if a previous file was successfully uploaded, the older file will be deleted and replaced with data from the new file.

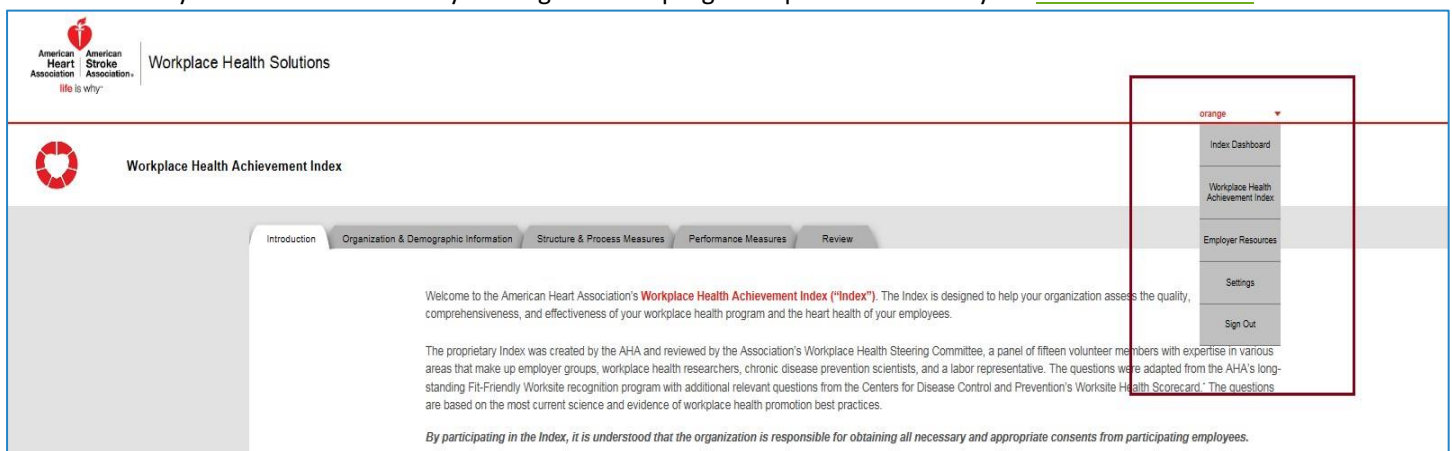
Verifying the Submitted Aggregate Report Met Data Requirements

Once the file is uploaded and successfully processed, you will receive a success email:



IMPORTANT: The success email above confirms that the file contained no data errors and was successfully processed. However, it **does not confirm** that you met the requirements to receive points for the three Performance Measures. To confirm if your data met the requirements to achieve points for the 3 Index Performance Measures, view your **Index Dashboard**. Contact technical Support at: workplacehealthsolutionssupport@heart.org or 888-242-4503 for assistance.

You can access your Index Dashboard by clicking on the top-right drop-down menu in your [Index Admin Portal](#):



From the drop-down menu, select the first option listed, **Index Dashboard**.

See next section for how to interpret Index Dashboard Results.

How to Read the Index Dashboard Performance Measures

Scroll down to the graphs displaying information for the 3 Index Performance Measures. If you have met requirements for the 3 Index Performance Measures, your dashboard will reflect that you have achieved points for the Performance Measures by the blue bar in each graph.

Note: You may need to wait up to 30 minutes after you received the Aggregate Report Success Email before results are displayed.



If after 20 minutes, you do not see data for your organization displayed as blue bars, this may mean that the data you submitted did not meet the data requirements to be eligible for points. If submitting closer to the March 31st deadline, it is possible to experience a greater lag time due to the volume of organizations uploading data. If you still do not see any data for your organization after 4 hours, please call our support team at 888-242-4503 or email workplacehealthsolutionssupport@heart.org.

Remember, points will only display for PM3 if you are in your second or subsequent year of the Index.

For more information regarding data requirements for the 3 Index Performance Measures, refer to the document: Choosing a Method for Submitting Employee Health Data for the 3 Index Performance Measures.

Technical Assistance

For additional assistance, contact Workplace Health Solutions Technical Assistance:

Email: workplacehealthsolutionsupport@heart.org

Phone: 888-242-4503