

Personal Health Assessment

Checklist

A large, thick green checkmark is positioned to the right of the word 'Checklist', which is written in a blue, handwritten-style font.



Personal Health Assessment

Checklist 

WELCOA's Ten Steps To Success

Determine Who Is Eligible To Participate

1. How many employees does your company have? _____
2. Is your entire employee population eligible to participate? ☐ Yes ☐ No
3. If no, how many employees will be eligible to take the PHA? _____
4. Will dependents be eligible to participate? ☐ Yes ☐ No
5. If yes, how many dependents will be eligible to take the PHA? _____

Identify Open Enrollment Period

1. What date would you like to launch the PHA? _____
2. What date would you like the enrollment period to end? _____

Develop Incentive Package

1. What percentage of participation would you like to achieve? _____ %
2. To meet this goal, will you be offering an incentive for participation? ☐ Yes ☐ No ☐ Not Sure
3. If yes:
 - a. What is the incentive you plan to offer? _____
 - b. How much will each incentive cost? \$ _____
 - c. Will you require a list of completers at the end of the open enrollment period? ☐ Yes ☐ No

Create Communications Campaign

1. What type of communication vehicles will you be utilizing to announce the PHA process?
(Check All That Apply)
☐ Internal Email ☐ Internal Mailings ☐ Internal Meetings ☐ Other _____
2. When will you begin to communicate the PHA to your eligibility list? _____
3. During the PHA Open Enrollment Process, do you plan to communicate with non-completers at the half way point?
As a final reminder? ☐ Yes ☐ No
☐ Yes ☐ No

Upload Eligibility File

1. What department will be preparing your PHA eligibility file? _____
2. Who is the person that will lead this process and what is their email address and phone number:
Name: _____
Email: _____
Phone: _____
3. How long will it take for this group to prepare your file? _____
4. Typical Columns Required for Excel Eligibility file:
 - a. First Name
 - b. Last Name
 - c. Company Name
 - d. Unique Email Address (must be unique to that person)
 - e. Unique User ID (An example might be an employee badge number, etc. along with an acronym for your company. Ex. welcoa1234)

Finalize Email Correspondence

1. Would you like to customize the email text that goes out to your employees on the day of the launch? ☐ Yes ☐ No
2. Who is the person in charge of developing the email text?
Name: _____
Email: _____
Phone: _____
3. Who will be sending the email out on the day of your launch?
☐ We will have our company launch the email
☐ We would like the PHA provider to launch the email
4. If your company will launch the PHA, who will be in charge of this?
Name: _____
Email: _____
Phone: _____
5. If your PHA provider will need to launch the email, who will they need to contact on your end to discuss the IT needs prior to launch?
Name: _____
Email: _____
Phone: _____

Launch Personal Health Assessment

1. In the event that your PHA provider would need to contact your organization regarding the launch of the PHA, who would be the primary contact?

Name: _____

Email: _____

Phone: _____

Monitor Completion Rates

1. Would you like to have an update each week throughout the process as to how many have taken the PHA? ☐ Yes ☐ No
2. If yes, who should receive this information?

Name: _____

Email: _____

Review Aggregate Report

1. If your company is eligible to receive an aggregate report, who should it be sent to?

Name: _____

Email: _____

Designate An Emergency Contact

1. In the event of an urgent or pressing matter, who would be the main and alternate contact persons?

Main Contact:

Name: _____

Phone: _____

Cell Phone: _____

Email: _____

Alternate Contact:

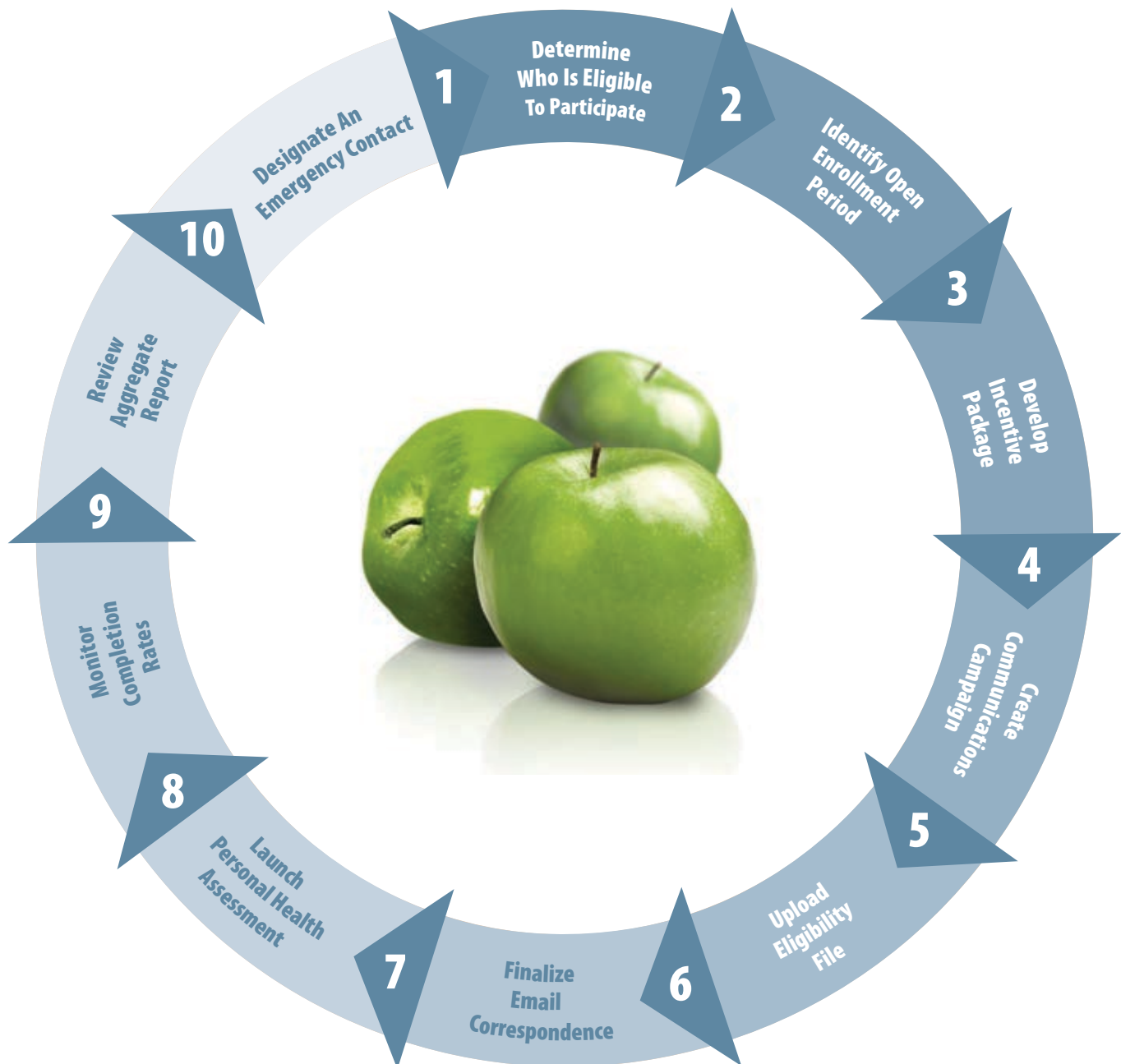
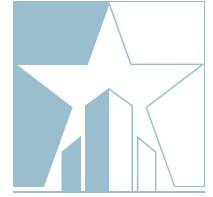
Name: _____

Phone: _____

Cell Phone: _____

Email: _____

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W E L L N E S S C O U N C I L O F A M E R I C A



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About WELCOA

Based in Omaha, NE, WELCOA was founded in 1987 as a national non-profit membership organization dedicated to promoting healthier life styles for all Americans, especially through health promotion initiatives at the worksite. Specifically, WELCOA focuses on building Well Workplaces—organizations that are dedicated to the health of their employees. The Well Workplace process provides business leaders and members with a structure or blue print to help their organizations build results-oriented wellness programs. In addition to helping organizations build structurally sound wellness programs, WELCOA responds to thousands of requests for information and materials by publishing a number of source books, a monthly newsletter read by approximately three million readers, an extensive line of brochures, as well as conducting numerous training seminars.