



Human Capital Management (HCM)

The Local Choice (TLC) Cardinal TLC Data Sheet Forum
March 15, 2023



Agenda

- TLC Data Sheet Certification
- Questions for TLC OHB Representatives
- Training Materials
- Accessing and Logging into Cardinal HCM
- Additional Support
- Meeting Wrap-Up



Viewing and Certifying the TLC Data Sheet



Certifications

Certification Issue?

If you run into any problems, submit a VCCC/Cardinal help desk ticket using the process on page 18.

Please be aware, **if** you need Cardinal to “**remove**” your certification, we will need a help desk ticket. The Cardinal team will need to remove all of your row/s. Localities will need to go back into your datasheet and re-enter the changes for this plan year, including the new rates.

We encourage localities to use the step-by-step Data Sheet job aid on page 7 to avoid issues with the certification process.



Questions for TLC OHB Representatives



Training Materials



Training Materials

Available Web-Based Training (WBT)

Need more information about Cardinal? The following Web-Based Training (WBT) courses provide an overview of a variety of Cardinal HCM functions.

Launch WBTs directly from the [Cardinal website](#).

- INTRO102: Overview of Cardinal Human Capital Management (HCM)
- NAV205: Navigation in Cardinal HCM
- NAV225: Cardinal Reporting HCM
- HR353: Human Resources Read-Only Overview
- BN362: Benefits Read-Only Overview



Training Materials, continued

[Cardinal HCM job aids](#) for step-by-step instructions:

- [BN361 TLC Data Sheet_Locality](#)
- [NAV225 Generating an HCM Report](#)
- [NAV225 Running an HCM Query](#)

Use the **Cardinal Enrollment Report** to view covered participant information.

Navigation: Benefits > Report > Cardinal Enrollment Report

Note: Not sure how to run a report? Use the Generating an HCM Report job aid, linked above.



New Cardinal Website Page for Localities

Find the recording and power point for the TLC Data Sheet Certification Forum at www.cardinalproject.virginia.gov/localityusers

Locality Users

Locality Core users are separated into two categories which determines their level of system usage – Centralized and Decentralized.

Centralized Localities: Use a centralized health benefits administration model and are centrally managed by The Local Choice (TLC). Helpful materials for centralized locality users include

- [Quick Start Registration Guide](#)
- [ACA Data Entry](#)
- [TLC Datasheet](#)
- [Open Enrollment](#)
- [Running an HCM Query](#)
- [Generating an HCM Report](#)
- [TLC Data Sheet Entry Forum Recording and Powerpoint](#)

Decentralized Localities: Use a decentralized health benefits administration model and therefore have additional access to Cardinal HCM to complete administrative functions. The three largest localities operate with this model. In addition to all of the centralized locality materials, helpful materials for decentralized locality users include:

- [HR352 Completing a New Hire \(Benefits Only\)](#)
- [BN361 Benefit Enrollment and Maintenance](#)
- [BN361 Completing a Manual Event_Locality](#)
- [BN361 Completing a New Hire and Benefit Enrollment_Locality](#)



Accessing and Logging into Cardinal HCM



What Type of User am I?

There are two types of users in Cardinal:

Employee Self-Service (ESS) Users

Locality employees who can **view** and **update** personal information in Cardinal such as name and address and enroll in health benefits.

- Access for ESS users is granted automatically when an employee is hired.
- The locality HR/Benefits (BN) professionals must ensure a valid email address is listed on the Enrollment form/personal data record in Cardinal to allow Locality ESS Users to access/login to Cardinal.

Core Users

Core users are locality HR/Benefits professionals who are responsible for administration of health benefit processes for their locality. Core users are typically also ESS Users.

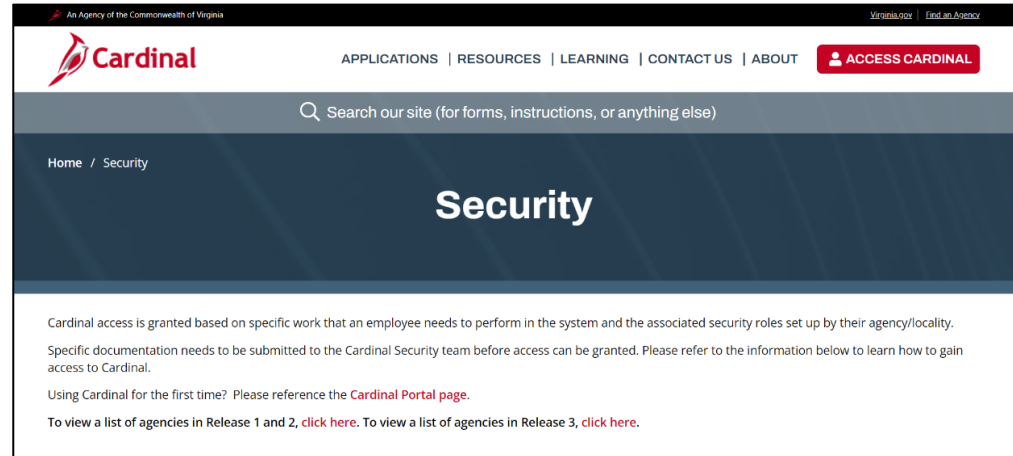
- Access for Core users is granted based on their role at their locality using the Cardinal Locality Security Access form.
- Reach out to TLC if you believe your access is incorrect.



Cardinal Security Process

If a Locality employee needs **new, updated, or reinstated Core** user access to Cardinal HCM, use the following process:

- Locality submits a [Locality Security Access form](#) (SE-LOCALITY-001) to TLC@dhrm.virginia.gov.
- The TLC group at DHRM reviews and approves the request and forwards the request to the Cardinal Security Team for processing.
- Once access has been established or updated, the Cardinal Security team notifies the Core user via email.



TLC Locality User Access

[Locality Security Handbook](#)

[Locality Security Access Form \(SE-LOCALITY-001-R1\)](#)

[Instructions for Security Access Form \(SE-LOCALITY-001-R1\)](#)

[TLC Locality Cardinal HCM Department ID List](#)

The [Cardinal Locality Security Form for Release 1 and 2](#) must be submitted to the Virginia Department of Human Resource Management Office of Health Benefits.



What Type of Locality am I?

Localities are separated into two categories which determines their level of system usage – Centralized and Decentralized.

- **350 Centralized Localities** use a centralized health benefits administration model and are centrally managed by The Local Choice (TLC).
- **Three Decentralized Localities** use a decentralized health benefits administration model and therefore have additional access to Cardinal HCM to complete administrative functions.

If you have questions on how your locality uses Cardinal, contact TLC for more information.



Key Email Domains and Email Addresses

In order for localities to receive important and timely communications from the Cardinal Project, DHRM, and TLC, it is crucial that standard email domains be added to your safelist to allow the emails to be successfully received. The following email domains should be safe listed:

- [*@public.govdelivery.com](#)
- [*@cardinal.virginia.gov](#)
- [*@doa.virginia.gov](#)

Key email addresses you may receive important communications from include:

- [DHRM-comms@public.govdelivery.com](#)
- [TLC@DHRM.virginia.gov](#)
- [cardinal-comms@public.govdelivery.com](#)
- [projectcardinal@doa.virginia.gov](#)



Login and Access

Accessing Cardinal

Cardinal can be accessed over public internet using my.cardinal.virginia.gov.

Locality users will first need to register (one time only) with the following information:

- **11-digit Cardinal Employee ID** - assigned in Cardinal upon hire and communicated to you by your HR/BN professional
- **Primary Email Address** - documented in Cardinal and communicated to you by your HR/BN professional

Don't go it alone, the registration process is complex! Follow the instructions in the [Cardinal Registration Quick Start Guide](#).

Once registered, Locality users can log into Cardinal using their email address and the password created during the registration process.



Password Tips and System Timeouts

Password Tips:

- If a password is entered incorrectly, the user will automatically be locked out after **3 failed attempts**.
- If the user has forgotten a username or password or locked themselves out, they can complete the **Forgot Username/Forgot Password Request***.
- Core Users will be required to **login and reset** their passwords every 90 days.

System Timeouts:

- Cardinal times out or terminates any session that is **inactive** for 30 minutes. If a user is timed out, any work that has not been saved will be lost.
 - Two minutes before a timeout occurs, the user will receive a warning message indicating that the session is about to time out.
 - It is always recommended to save work as often as possible.
 - If multiple Cardinal windows are open, the user is timed out of all windows.



Additional Support



Additional Support

There are many resources and options available to Core users for additional support.

TLC Support

- For questions about health care plans and benefits, contact The Local Choice (TLC) Support Team by emailing tlc@dhrm.virginia.gov
- TLC also provides many important updates and messages via [The Local Choice E-News List](#).

TLC Data Sheet Entry is due by Wednesday, April 5 for all July renewals!



Additional Support, continued

VCCC/Cardinal Help Desk

- If you need additional support, send an email to VCCC@vita.virginia.gov with **"CARDINAL"** in the subject line and follow the guidance below.
 - Include the following:
 - Locality Name and 9-digit DHRM Group Number (e.g., 047-000-000)
 - First and Last Name
 - Email address and a Phone number at which you can be reached
 - Provide detailed information! (e.g., error message, key strokes, attached screenshots)
 - Sending screenshots?
 - Attach a document with the screenshots as opposed to inserting them into the body of the email.
 - DO NOT include sensitive personal information on those screenshots. Make sure sensitive data is blurred or cropped out.
 - Do not send “encrypted” emails (i.e., Virtru)
 - Do not copy other mailboxes when submitting ticket



Meeting Wrap-Up