

TLC Data Sheet Overview

The Department of Human Resource Management (DHRM) collects employer information from the participants of The Local Choice (TLC) health care program for each Plan Year (PY). This information is maintained in Cardinal for use during Open Enrollment, for maintenance due to Life Events, and is communicated to the various participating Vendors. This information is also maintained for administrative purposes by the Office of Health Benefits (OHB). The information will be entered online by the TLC employers using the TLC Data Sheet.

This document explains where and how the TLC employers will enter the annual plan changes in Cardinal using the TLC Data Sheet.

If any updates are required for your TLC Contacts, refer to the Job Aid titled BN361_TLC Contacts_Locality. This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.

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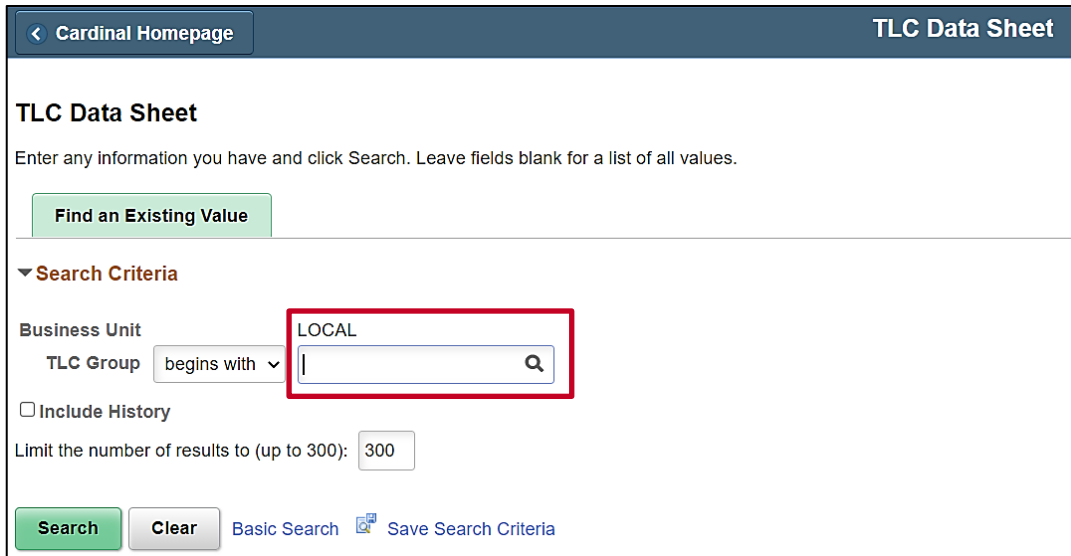
Updating an Existing TLC Plan using the TLC Data Sheet.....2

Updating an Existing TLC Plan using the TLC Data Sheet

1. To update an existing TLC Plan, navigate to the **TLC Data Sheet** page by following this path:

Navigator > Menu > Benefits > Employer Information > TLC Data Sheet

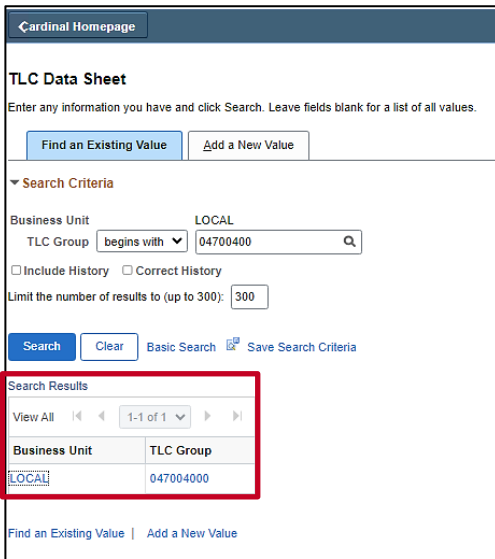
The **TLC Data Sheet Search** page displays.



2. If known, enter the TLC Group number in the **TLC Group** field and proceed to Step 5. If the TLC Group number is not known, continue to Step 3.

3. Click the **TLC Group Look Up** icon (magnifying glass icon to the right of the **TLC Group** field) if the TLC Group number is not known.

The **Look Up TLC Group** page displays in a pop-up window.



Cardinal Homepage

TLC Data Sheet
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) | [Add a New Value](#)

▼ **Search Criteria**

Business Unit: LOCAL
 TLC Group: begins with 04700400

Include History Correct History
 Limit the number of results to (up to 300): 300

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Search Results
View All | 1-1 of 1

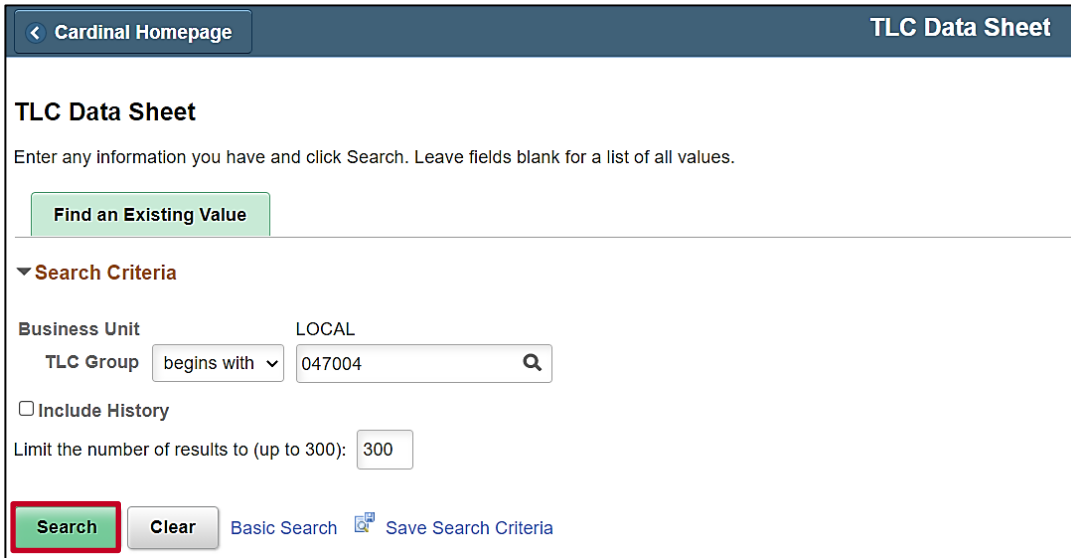
Business Unit	TLC Group
LOCAL	047004000

[Find an Existing Value](#) | [Add a New Value](#)

- The available TLC Groups display. Select the applicable **TLC Group** by clicking the corresponding link in the **TLC Group** column.

Note: Only the TLC Groups that you have security access to will display for selection.

The **TLC Data Sheet Search** page redisplay with the selected TLC Group.



Cardinal Homepage **TLC Data Sheet**

TLC Data Sheet
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

▼ **Search Criteria**

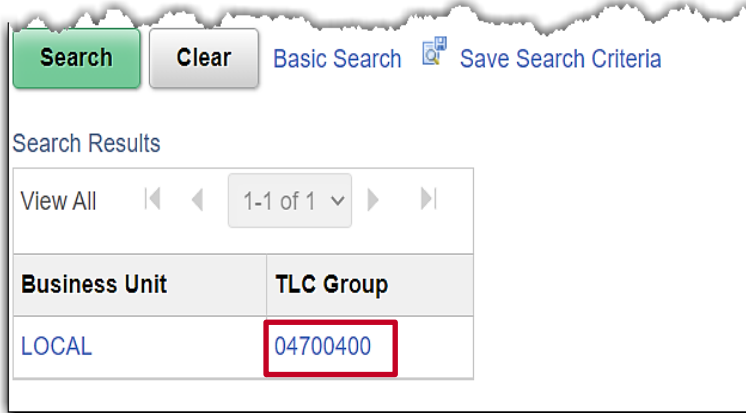
Business Unit: LOCAL
 TLC Group: begins with 047004

Include History
 Limit the number of results to (up to 300): 300

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

- Click the **Search** button.

The search results display at the bottom of the page.



Search [Search] Clear Basic Search Save Search Criteria

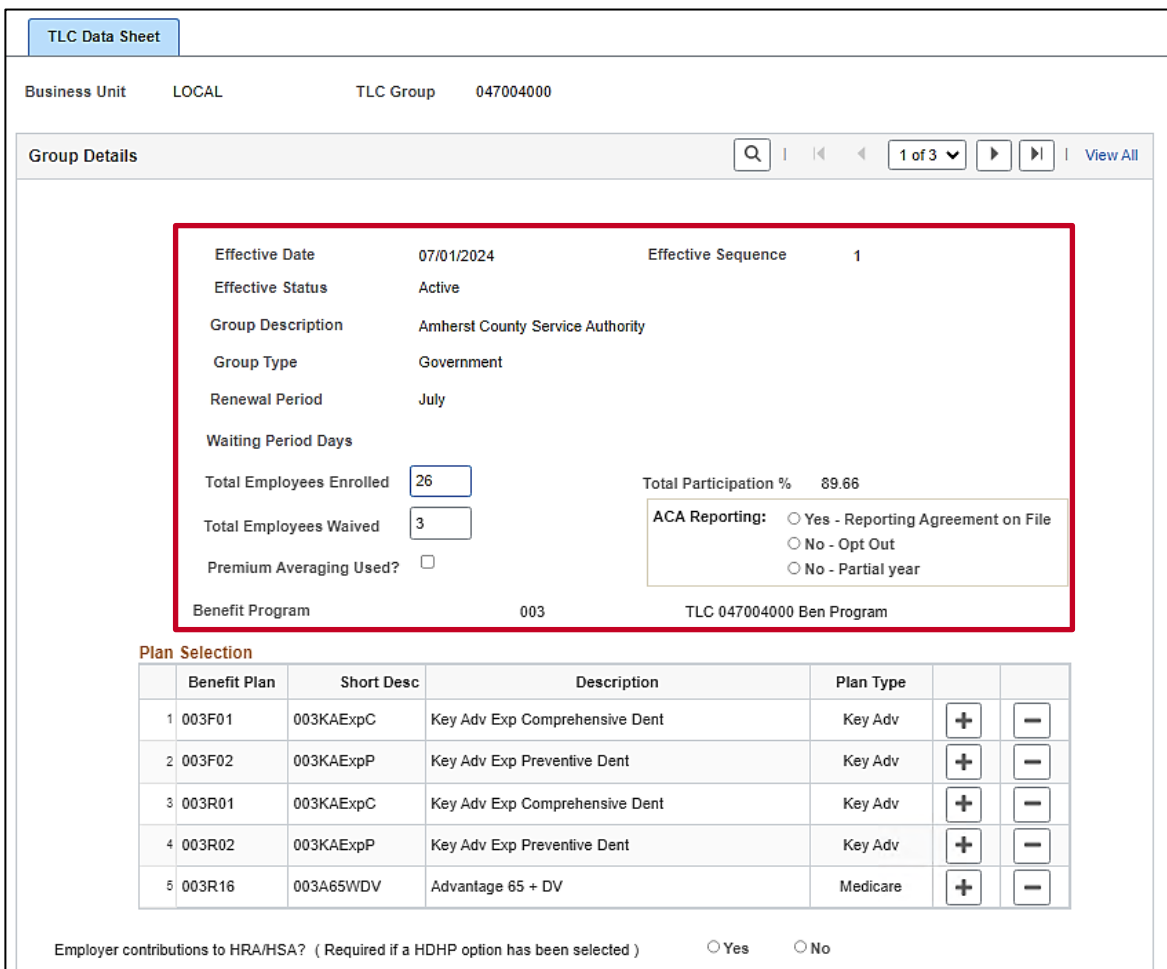
Search Results

View All 1-1 of 1

Business Unit	TLC Group
LOCAL	04700400

6. Click the link within the **TLC Group** field.

The **TLC Data Sheet** page displays.



TLC Data Sheet

Business Unit LOCAL TLC Group 047004000

Group Details 1 of 3 View All

Effective Date 07/01/2024 Effective Sequence 1

Effective Status Active

Group Description Amherst County Service Authority

Group Type Government

Renewal Period July

Waiting Period Days

Total Employees Enrolled Total Participation % 89.66

Total Employees Waived

ACA Reporting: Yes - Reporting Agreement on File
 No - Opt Out
 No - Partial year

Premium Averaging Used?

Benefit Program 003 TLC 047004000 Ben Program

Plan Selection

	Benefit Plan	Short Desc	Description	Plan Type		
1	003F01	003KAExpC	Key Adv Exp Comprehensive Dent	Key Adv	<input type="button" value="+"/>	<input type="button" value="-"/>
2	003F02	003KAExpP	Key Adv Exp Preventive Dent	Key Adv	<input type="button" value="+"/>	<input type="button" value="-"/>
3	003R01	003KAExpC	Key Adv Exp Comprehensive Dent	Key Adv	<input type="button" value="+"/>	<input type="button" value="-"/>
4	003R02	003KAExpP	Key Adv Exp Preventive Dent	Key Adv	<input type="button" value="+"/>	<input type="button" value="-"/>
5	003R16	003A65WDV	Advantage 65 + DV	Medicare	<input type="button" value="+"/>	<input type="button" value="-"/>

Employer contributions to HRA/HSA? (Required if a HDHP option has been selected) Yes No

7. Review the following fields displayed in the **Group Details** section:

- a. **Effective Date:** When the TLC employer accesses Cardinal to update the data for an upcoming Plan Year, the effective date will be future dated. The **Effective Date** field is not editable by TLC employers

Note: For further information on effective dating, see the Job Aid titled **HR351_Overview of Effective Dating**. This Job Aid is found on the Cardinal website in **Job Aids** under **Learning**.

- b. **Group Description:** Description of the group for which data is being collected. This will generally refer to the primary TLC employer when multiple TLC employers are combined into a group. The **Group Description** field is not editable by TLC employers
- c. **Group Type:** Each TLC group is categorized by OHB as “School”, “Government”, or “Government and School”. The **Group Type** field is not editable by TLC employers
- d. **Renewal Period:** Plan Year begin month – July (07/01 to 06/30) or October (10/01 to 09/30). The **Renewal Period** field is not editable by TLC employers
- e. **Waiting Period Days:** The number of days an employee has to enroll in a health care plan upon hire (initial enrollment). To be compliant with the Affordable Care Act (ACA), this cannot be more than a 60 day waiting period. The **Waiting Period Days** field is not editable by TLC employers
- f. **Total Employees Enrolled:** Number of employees selecting coverage. Update as applicable
- g. **Total Employees Waived:** Number of employees waiving coverage. Update as applicable
- h. **Total Participation %:** A calculated value of Total Employees Enrolled to Total Employees (enrolled + waived). The Total Participation % determines the minimum employer contribution for each plan selected
- i. **Premium Averaging Used:** Premium Averaging is an option to employers offering multiple plans (excluding the High Deductible Plan). Premium averaging will be determined by using the average Self Only Comprehensive dental premium for all included plans. Once the average premium has been determined, the minimum employer contribution is applied to all applicable plans
- j. **ACA Reporting:** Use the radio button options in this section to indicate if ACA forms should be produced for your Group. If you are not participating, select the applicable reason (Opt Out or Partial year participant)
- k. **Benefit Program** – Each TLC group is assigned a Benefit Program under which the chosen plans and rates are maintained. The Benefit Program field is not editable by TLC employers

TLC Data Sheet

Business Unit LOCAL TLC Group 047004000

Group Details Q | < | << 1 of 3 >> | > | View All

Effective Date 07/01/2024 Effective Sequence 1

Effective Status Active

Group Description Amherst County Service Authority

Group Type Government

Renewal Period July

Waiting Period Days

Total Employees Enrolled Total Participation % 89.66

Total Employees Waived **ACA Reporting:** Yes - Reporting Agreement on File

Premium Averaging Used? No - Opt Out

No - Partial year

Benefit Program 003 TLC 047004000 Ben Program

Plan Selection

	Benefit Plan	Short Desc	Description	Plan Type		
1	003F01	003KAExpC	Key Adv Exp Comprehensive Dent	Key Adv	+	-
2	003F02	003KAExpP	Key Adv Exp Preventive Dent	Key Adv	+	-
3	003R01	003KAExpC	Key Adv Exp Comprehensive Dent	Key Adv	+	-
4	003R02	003KAExpP	Key Adv Exp Preventive Dent	Key Adv	+	-
5	003R16	003A65WDV	Advantage 65 + DV	Medicare	+	-

Employer contributions to HRA/HSA? (Required if a HDHP option has been selected) Yes No

8. Review the fields displayed in the **Plan Selection** section. Each year the new TLC Data Sheet will be populated with the Plan Selections chosen the year before.
9. To change Plan Selections, choose the following options, as applicable:
 - a. Click the **Add a New Row +** icon to insert a Benefit Plan
 - b. Click the **Delete Row -** icon to delete a Benefit Plan

Note: Groups selecting plans which offer a comprehensive and a preventative dental option must select each plan. Any desired change for Medicare plans must be coordinated through OHB.

TLC Data Sheet

Business Unit LOCAL TLC Group 047004000

Group Details 1 of 3 | View All

Effective Date	07/01/2024	Effective Sequence	1
Effective Status	Active		
Group Description	Amherst County Service Authority		
Group Type	Government		
Renewal Period	July		
Waiting Period Days			
Total Employees Enrolled	<input type="text" value="26"/>	Total Participation %	89.66
Total Employees Waived	<input type="text" value="3"/>	ACA Reporting: <input type="radio"/> Yes - Reporting Agreement on File <input type="radio"/> No - Opt Out <input type="radio"/> No - Partial year	
Premium Averaging Used?	<input type="checkbox"/>		
Benefit Program	003	TLC 047004000 Ben Program	

Plan Selection

	Benefit Plan	Short Desc	Description	Plan Type		
1	003F01	003KAExpC	Key Adv Exp Comprehensive Dent	Key Adv	+	-
2	003F02	003KAExpP	Key Adv Exp Preventive Dent	Key Adv	+	-
3	003R01	003KAExpC	Key Adv Exp Comprehensive Dent	Key Adv	+	-
4	003R02	003KAExpP	Key Adv Exp Preventive Dent	Key Adv	+	-
5	003R16	003A65WDV	Advantage 65 + DV	Medicare	+	-

Employer contributions to HRA/HSA? (Required if a HDHP option has been selected) Yes No

10. If a High Deductible Health Plan (HDHP) is selected, the **Employer contributions to HRA/HAS?** field must be completed by selecting the **Yes** or **No** radio button option. The response to this impacts the Minimum Employer Contribution (MEC) values on the **Premium Rates** page. No selection is necessary if no HDHP is selected.
11. Scroll down to the **Departments** section.

Departments

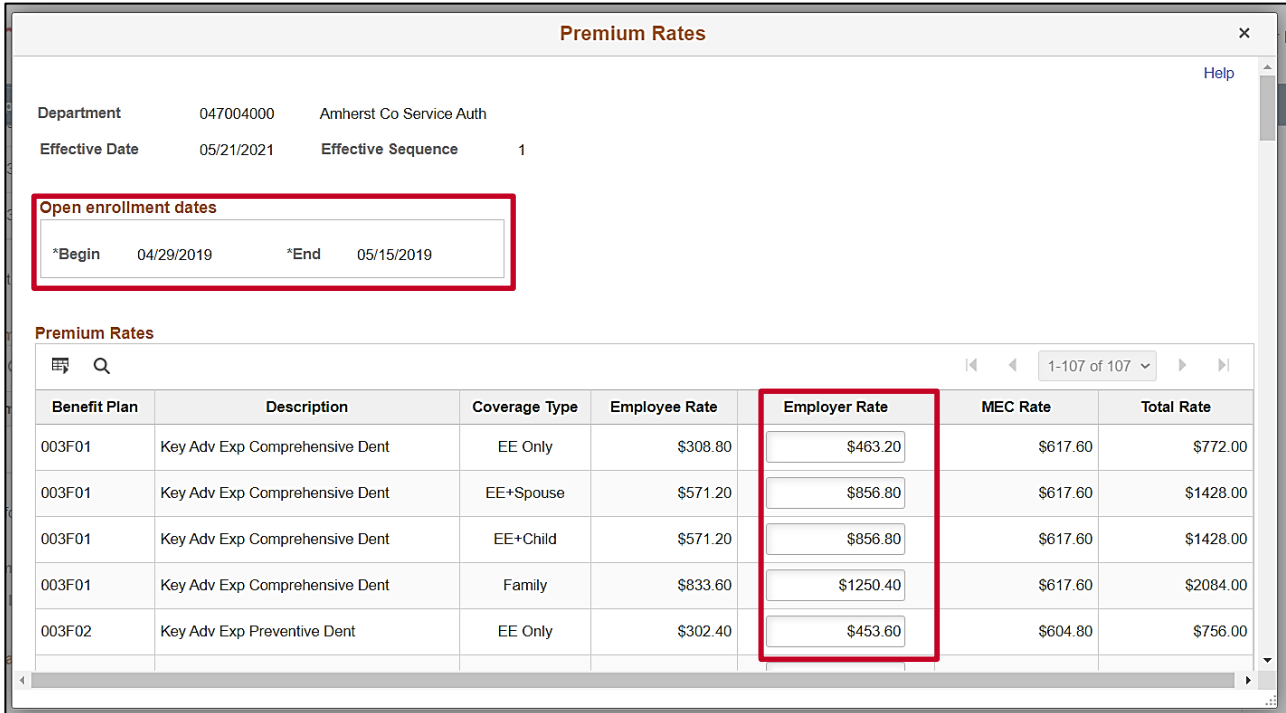
1-1 of 1 | View All

Primary Flag	Department	Description	Rates	Class		
<input checked="" type="radio"/>	047004000	Amherst Co Service Auth	Rates	Class	+	-

Note: The Departments represent the individual TLC employers within the TLC Group. The TLC employer tasked with populating the TLC Data Sheet will be marked as Primary. Any changes to the Departments must be coordinated through OHB.

12. Click on the **Rates** link for the corresponding Department.

The **Premium Rates** page displays in a pop-up window.



Premium Rates

Department 047004000 Amherst Co Service Auth
 Effective Date 05/21/2021 Effective Sequence 1

Open enrollment dates

*Begin 04/29/2019 *End 05/15/2019

Premium Rates

Benefit Plan	Description	Coverage Type	Employee Rate	Employer Rate	MEC Rate	Total Rate
003F01	Key Adv Exp Comprehensive Dent	EE Only	\$308.80	\$463.20	\$617.60	\$772.00
003F01	Key Adv Exp Comprehensive Dent	EE+Spouse	\$571.20	\$856.80	\$617.60	\$1428.00
003F01	Key Adv Exp Comprehensive Dent	EE+Child	\$571.20	\$856.80	\$617.60	\$1428.00
003F01	Key Adv Exp Comprehensive Dent	Family	\$833.60	\$1250.40	\$617.60	\$2084.00
003F02	Key Adv Exp Preventive Dent	EE Only	\$302.40	\$453.60	\$604.80	\$756.00

Note: The **Premium Rates** page will display only rows for the Benefit Plans selected in the **Plan Selection** section. The **Total Rate** field reflects the total premium amount for the individual Benefit Plan and Coverage Type combination. The **Employer Rate** field must be entered for each Department even if the values are the same for all Departments. The Open Enrollment dates are displayed in the **Open enrollment dates** section at the top of the page. These dates are set by OHB.

- Enter the applicable employer rate amounts in the **Employer Rate** fields for all of the benefit plans listed.

Note: The **Employee Rate** field will automatically be adjusted once the employer rate is entered (Employee Rate + Employer Rate = Total Rate). The **MEC Rate** field (Minimum Employer Contribution) displays the minimum amount for the employer rate. The **Employer Rate** field amount must be equal to or greater than the **MEC Rate** field amount.

BN361_TLC Data Sheet_Locality

The **Premium Rates** page will highlight the incorrect fields in red and will not let you save the rate amounts if the Employer Rate is less than the MEC Rate. Example of the **Premium Rates** page with an error:

x
Help

Department 047004000 Amherst Co Service Auth
Effective Date 04/28/2021 **Effective Sequence** 1

Open enrollment dates

*Begin	04/29/2019	*End	05/15/2019
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Premium Rates

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Benefit Plan	Description	Coverage Type	Employee Rate	Employer Rate	MEC Rate	Total Rate
003F01	Key Adv Exp Comprehensive Dent	EE Only	\$22.00	<input type="text" value="\$750.00"/>	\$617.60	\$772.00
003F01	Key Adv Exp Comprehensive Dent	EE+Spouse	\$828.00	<input type="text" value="\$600.00"/>	\$750.00	\$1428.00
003F01	Key Adv Exp Comprehensive Dent	EE+Child	\$624.47	<input type="text" value="\$803.53"/>	\$750.00	\$1428.00
003F01	Key Adv Exp Comprehensive Dent	Family	\$1250.00	<input type="text" value="\$834.00"/>	\$750.00	\$2084.00
003F02	Key Adv Exp Preventive Dent	EE Only	\$123.25	<input type="text" value="\$632.75"/>	\$604.80	\$756.00

Example of the corrected **Premium Rates** page:

x
Help

Department 047004000 Amherst Co Service Auth
Effective Date 04/28/2021 **Effective Sequence** 1

Open enrollment dates

*Begin	04/29/2019	*End	05/15/2019
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Premium Rates

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Benefit Plan	Description	Coverage Type	Employee Rate	Employer Rate	MEC Rate	Total Rate
003F01	Key Adv Exp Comprehensive Dent	EE Only	\$22.00	<input type="text" value="\$750.00"/>	\$617.60	\$772.00
003F01	Key Adv Exp Comprehensive Dent	EE+Spouse	\$677.60	<input type="text" value="\$750.40"/>	\$750.00	\$1428.00
003F01	Key Adv Exp Comprehensive Dent	EE+Child	\$624.47	<input type="text" value="\$803.53"/>	\$750.00	\$1428.00
003F01	Key Adv Exp Comprehensive Dent	Family	\$1250.00	<input type="text" value="\$834.00"/>	\$750.00	\$2084.00
003F02	Key Adv Exp Preventive Dent	EE Only	\$123.25	<input type="text" value="\$632.75"/>	\$604.80	\$756.00

- Once all of the employer rates are entered with no errors, click the **OK** button at the bottom of the page.

The **TLC Data Sheet** page returns.

Departments						
Primary Flag	Department	Description	Rates	Class		
<input checked="" type="radio"/>	047004000	Amherst Co Service Auth	Rates	Class	<input type="button" value="+"/>	<input type="button" value="-"/>

15. Scroll down as needed and click the **Class** link within the **Departments** section.

Note: Class will carry over from the prior Plan Year. If anything needs to be added or removed, the TLC group can do this through the **Class** link.

The **Employee Classification** page displays in a pop-up window.

Employee Classification x

[Help](#)

Department 047004000 Amherst Co Service Auth

Effective Date 05/21/2021 Effective Sequence 1

Employee Classifications

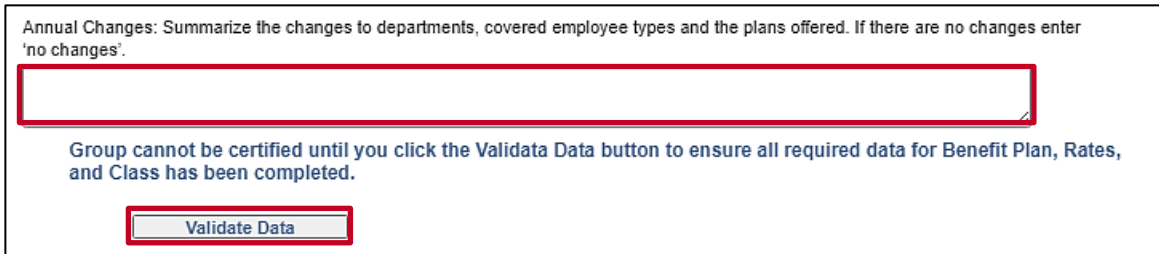
	Employee Classification	Billing Method		
1	COBRA Qual Ben - Disability	Direct Billing	<input type="button" value="+"/>	<input type="button" value="-"/>
2	COBRA Qual Ben - Regular	Direct Billing	<input type="button" value="+"/>	<input type="button" value="-"/>
3	Early Retirees - Not Medicare	Direct Billing	<input type="button" value="+"/>	<input type="button" value="-"/>
4	Full-Time Employee	Group Billing	<input type="button" value="+"/>	<input type="button" value="-"/>
5	Medicare Retirees	Direct Billing	<input type="button" value="+"/>	<input type="button" value="-"/>

16. Use the corresponding **Add a New Row (+)** or **Delete Row (-)** buttons to add or remove classes as needed.

Note: The only mandatory Employee Classification is Full-Time Employee. For each Employee Classification, a billing method must be selected. The **Billing Method** options are “Direct Billing”, “Group Billing”, or “Third-Party Administrator”.

17. Once any required updates are made, click the **OK** button.

The **TLC Data Sheet** page returns.



Annual Changes: Summarize the changes to departments, covered employee types and the plans offered. If there are no changes enter 'no changes'.

Group cannot be certified until you click the **Validate Data** button to ensure all required data for Benefit Plan, Rates, and Class has been completed.

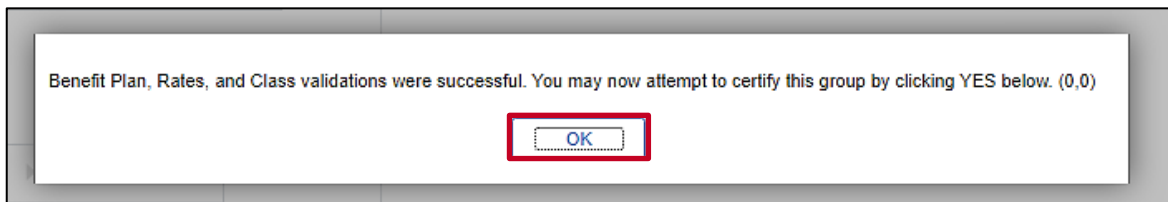
Validate Data

18. Complete the **Annual Changes** field. Use this field to list any changes that were made to departments, covered employee types, and the plans offered. For example, if a plan was removed, use this field to relay what plan employees in the dropped plan have been enrolled into. If there were not changes, enter "No changes". This field is required.

19. Click the **Validate Data** button to verify that all the information has been added correctly.

Note: If any errors or missing information is found, a warning message will appear to let you know what piece of information needs to be edited/fixd. If a message appears, take the necessary steps to fix the error before continuing.

A **Confirmation** message displays in a pop-up window.



Benefit Plan, Rates, and Class validations were successful. You may now attempt to certify this group by clicking YES below. (0,0)

OK

20. Click the **OK** button.

The **TLC Data Sheet** page redispays.



Validate Data

I certify the information is correct Yes No

Certifier Name

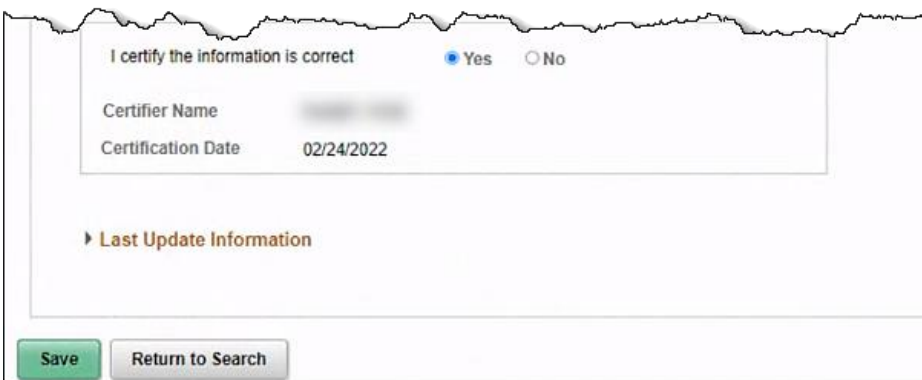
Certification Date

21. Scroll down as needed and click the **Yes** radio button within the **I certify the information is correct** statement.

Note: Once saved, the Certifier Name and Certification Date fields will auto-populate with your name and the current date.

22. Click the **Save** button at the bottom of the page.

The page refreshes with the certification information populated.



I certify the information is correct Yes No

Certifier Name

Certification Date 02/24/2022

► Last Update Information

Save Return to Search

Note: Once you have certified the TLC Data Sheet, no further changes can be made in Cardinal. If you need to make a change, contact the TLC Group at OHB.

23. Once the data sheet is certified, run the TLC Data Sheet Report. This report provides a PDF version of the TLC Data Sheet. Refer to the Cardinal HCM Benefits Reports Catalog for additional information and the navigation path for this Report. This Reports Catalog is located on the Cardinal Website in **Reports Catalogs** under **Resources**. Refer to the Job Aid titled NAV225_Generating and HCM Report for the general steps used to generate an HCM Report. This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.