



Human Capital Management (HCM)

The Local Choice (TLC) Data Sheet Forum

March 13, 2025



Agenda

- TLC OHB Introduction
- Demo
- TLC Data Sheet – Updating & Certifying
- Questions
- Support
- Meeting Wrap-Up



Presentation materials and the recording will be sent after the webinar.

Introduction



Welcome from TLC OHB Group

Reminder: Today's forum is dedicated to the comprehensive review of The Local Choice Data Sheet in Cardinal.

Email all questions regarding policy and provisions of the program to TLCPolicy@dhrm.virginia.gov

The TLC 2025 Regional Meetings will be virtual this year. The date(s) and time will be provided in the TLC E-News.



Thank you for your continued partnership!



TLC Data Sheet Timeline

TLC Data Sheet Entry and Certification is due by **Tuesday, April 1** for all July renewals!

TLC Data Sheet Entry and Certification dates for October renewals will be communicated at a later date.





Cardinal HCM Login & Access 101

How to get to Cardinal HCM

- my.cardinal.virginia.gov

Do you have access to the TLC Data Sheet?

- Core users can navigate to TLC Data Sheet using the following navigation path:

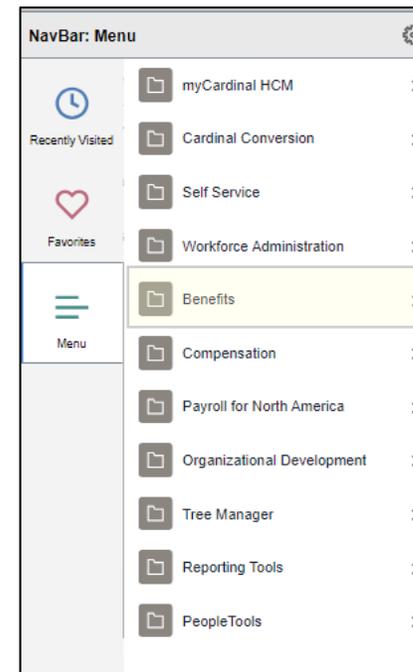
Menu > Benefits > Employer Information > TLC Data Sheet

Can't get to the TLC Data Sheet? You don't have proper access!

- Submit a [Locality Security Access Form](#) directly to TLC

Tired of losing Core User access?

- Login at least once every **90 days**



my.cardinal.virginia.gov

Demo TLC Data Sheet

Updating and Certifying TLC Data Sheet Recap



Navigating to the TLC Data Sheet in Cardinal



Log into Cardinal at **my.cardinal.virginia.gov**



Click Human Capital Management (HCM) link



Menu > Benefits > Employer Information > TLC Data Sheet



Open your Locality's Data Sheet

Navigation: Menu > Benefits > Employer Information > TLC Data Sheet

The TLC Data Sheet Search page displays, enter your TLC group number.



Click **Search**.



The **TLC Data Sheet** will display.

TLC Data Sheet

Enter any information you have and click Search. Leave fields blank for a list of results.

Find an Existing Value

▼ **Search Criteria**

Business Unit LOCAL

TLC Group begins with

Include History

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

If you do not know your TLC group number, click the magnifying glass icon to open the **Look Up TLC Group** page.

TLC Data Sheet

Business Unit LOCAL TLC Group

Group Details

Effective Date 07/01/2024 Effective Sequence 1

Effective Status Active

Group Description

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 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

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Review Group Details

Prior to each new plan year, the TLC data sheet is created with the group profile information populated.

- Locality should review and update as appropriate.
- Some fields on this page are not editable by the locality; please contact TLC if changes are required.
- Please refer to the [BN361 TLC Data Sheet Locality](#) job aid for more details.

Tip: Use the Cardinal Enrollment Report to determine Total Employees Enrolled and Total Employees Waived.

Menu > Benefits > Reports > Cardinal Enrollment

TLC Data Sheet

Business Unit LOCAL TLC Group

Group Details

Effective Date 07/01/2024 Effective Sequence 1

Effective Status Active

Group Description

Group Type Government

Renewal Period July

Waiting Period Days

Total Employees Enrolled 26 Total Participation % 89.66

Total Employees Waived 3

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

Premium Averaging Used?

Benefit Program 003 TLC 04 Ben Program

	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	+	-

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

Need to make changes to the Group Details? Contact TLC.



Make Changes to Plan Selection

Each year the new TLC Data Sheet will be populated from the Plan Selections chosen the year before.

When a High Deductible Health Plan (HDHP) is selected, the **Employer contributions to HRA/HSA** question must be answered by selecting the **Yes** or **No** radio button.

- No selection is necessary if no HDHP is selected.

The response to the HRA/HSA question impacts the Minimum Employer Contribution (**MEC**) values on the rate page.

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

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



Do current plans auto populate on the Data Sheet?

- **Yes!** Current plans auto populate on the Data Sheet



Departments: Rates

The Premium Rates page will display only rows for the Benefit Plans selected in the Plan Selection section.

Enter the applicable Employer Rate in the **Employer Rate** field.

- The Employer Rate will need to be populated for each Department even if the values are the same for all Departments.
- The Employee Rate automatically adjusts such that Employee Rate + Employer Rate = Total Rate.

The Employer Rate must be more than the MEC Rate.

- Incorrect fields will highlight in red and will not allow you to save.

Departments

1-1 of 1 | View All

Primary Flag	Department	Description	Rates	Class		
<input type="checkbox"/>	047		<input type="text" value="Rates"/>	Class	<input type="button" value="+"/>	<input type="button" value="-"/>

Premium Rates

Department 04 | Effective Date 04/28/2021 | Effective Sequence 1

Open enrollment dates: *Begin 04/29/2019 | *End 05/15/2019

Premium Rates

1-107 of 107

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



Departments: Employee Classification

Class will carry over from the prior year.

Use the Add a New Row + or Delete Row – buttons to add or remove classes.

- 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.

Primary Flag	Department	Description	Rates	Class		
<input checked="" type="checkbox"/>	047		Rates	Class	+	-

Employee Classification

Department: 047

Effective Date: 05/21/2021 Effective Sequence: 1

	Employee Classification	Billing Method		
1	COBRA Qual Ben - Disability	Direct Billing	+	-
2	COBRA Qual Ben - Regular	Direct Billing	+	-
3	Early Retirees - Not Medicare	Direct Billing	+	-
4	Full-Time Employee	Group Billing	+	-
5	Medicare Retirees	Direct Billing	+	-

OK Cancel



TLC Data Sheet: Summary, Validate, Certify

Summarize **Annual Changes** (Required Field)

- List changes to departments, covered employee types, and plans offered.
- If a plan is being removed, specify the replacement plan into which employees will be enrolled.
- **If no changes, type “No Changes” in the field**

Click on **Validate Data** to verify all the information has been added correctly.

- **Note:** A warning message will appear if system finds errors or missing information to let you know which piece of information needs an edit/fix. Take the necessary steps to fix error(s) before continuing.

Click **Yes** to certify the information is correct.

Once saved, the Certifier Name and Certification Date will auto populate with the person logged in and the current date.

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 Validata Data button to ensure all required data for Benefit Plan, Rates, and Class has been completed.

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

I certify the information is correct Yes No

Certifier Name

Certification Date



TLC Contacts Page

Menu > Benefits > Employer Information > TLC Contacts

1. Search for your TLC Department.
2. Select the contact type for update:
Ben Admin, Ben Exec, Bill Admin, or Bill Exec.
Note: Limit 1 contact per contact type.
3. To update the contact, click **Add Row (+)**
4. If the contact is an employee, enter the employee ID in the Contact EIN field. For employees, once the Contact EIN field is populated, Name, Email ID, and Phone will auto populate on the Contacts page. Non-employees will need to be entered manually.

TLC Contacts

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

Department

Contact Type

Include History Correct History

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

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

Search Results

View All

TLC Group	Department	Contact Type
047071000	047071000	Ben Admin
047071000	047071000	Ben Exec

TLC Contacts

Department

Department Contacts [View All](#)

Effective Date

Contact Type

Contact EIN

Name

Email ID

Phone Ext

Enter a complete phone number including the area code.

[+](#) [-](#)

[Mailing Address](#)

[Shipping Address](#)



TLC Data Sheet Report

Menu > Benefits > Employer Information > TLC Data Sheet Report

PDF Report of the TLC Data Sheet available to locality Core Users.

This report can be run for:

- **All of your TLC groups:** This includes both main groups and any subgroups
- **A specific TLC group:** You can choose to see the report for just one particular group

2024 - 2025 The Local Choice (TLC) Data Sheet Page 1 of 3

Group: Applies to all Group IDs

<input checked="" type="checkbox"/>	Government Group	<input type="checkbox"/>	School Group	<input type="checkbox"/>	Government & School Group	<input type="checkbox"/>	Grandfathered Government & School Group
<input checked="" type="checkbox"/>	July Renewal: Begins: 7/1/2024		Ends: 6/30/2025				

A group must have a separate group ID, assigned by DHRM, for each Federal Employer Identification (FEIN) included in the group and one of the group IDs must be primary. Separate group IDs with the same FEIN are also permitted.

<input checked="" type="checkbox"/>	This group has one Group ID and one FEIN.
<input type="checkbox"/>	This group has more than one Group ID and one FEIN.
<input type="checkbox"/>	This group has more than one Group ID and more than one FEIN.

Primary ID: [REDACTED]

Each Group ID may have different employer cost-sharing. Open Enrollment dates and contacts.

Classifications: Applies to all Group IDs

Enrollee Category	Offer Coverage?	Billing Method
Full-Time Employees	Yes	Group Billing
Part-Time Employees	No	
Elected Official with full-time premium	Yes	Group Billing
Elected Official with part-time premium	No	
Extended Coverage/COBRA Qualified Beneficiaries - Regular	Yes	Direct Billing
Early Retirees - not eligible for Medicare	Yes	Group Billing
Medicare Retirees - eligible for Medicare	Yes	Direct Billing
Split Contract Dependents of Retirees	Yes	Group Billing
Retiree Survivor - not eligible for Medicare	No	
Retiree Survivor - eligible for Medicare	Yes	Group Billing
Extended Coverage/COBRA Qualified Beneficiary - Disability	Yes	Direct Billing
Survivor of Employee extra month coverage	No	

Election Rules: Applies to all Group IDs

Initial Enrollment as an Employee Election Request (Effective the first of the month after the waiting period): Applies to all Group IDs

<input checked="" type="checkbox"/>	Rule 1: No waiting period	0	Number of days allowed to make the enrollment election request	30
<input type="checkbox"/>	Rule 2: Waiting period (1-60 days)		Number of days allowed to make the enrollment election request	

Participation: Applies to all Group IDs

Primary ID: [REDACTED]	Enrolled Count	Waived Count	Eligible Count (Enrolled + Waived)
Full-time Employees	26	1	27
Total for this Group ID	26	1	27
Total Participation Percentage			96%

Plans: Applies to all Group IDs

Key Advantage Plan Choices	Key Adv 500 Comprehensive Dent Key Adv 500 Preventive Dent
High Deductible Plan Choice	
Regional HMO Choice	Kaiser HMO
Medicare Plan Choice	Advantage 65 + DV

Questions?

Support



TLC Support

Questions about
the content of
the TLC Data
Sheet?

Need to change
Group Details
on the TLC Data
Sheet?

**Contact
TLC**

Need to make
corrections after
you certify?

General health
care plan and
benefits
questions?



Email:

- tlc@dhrm.virginia.gov
- tlcpolicy@dhrm.virginia.gov



Phone:
888-642-4414



[The Local Choice E-News
List](#)

- Latest updates and messages
from TLC



Cardinal Support

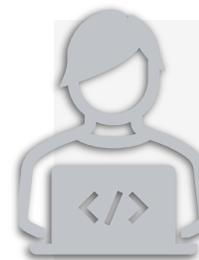
Is a page not working?

Technical questions about Cardinal?

Contact Cardinal

Login Issues?

Need support with Cardinal functions?



Submit a ticket to Cardinal



Email
vccc@vita.virginia.gov

- Include “Cardinal” in the subject line



How to Submit a Cardinal Help Desk Ticket

Submit a help desk ticket by emailing vccc@vita.virginia.gov and include the following information:

Subject: Cardinal - <brief summary for routing (i.e.: TLC Data Sheet)>

Email Contents:

- Detailed information about your issue (i.e., page, actions, error).
- Locality Name and 9-digit DHRM Group Number (e.g., 047-000-000)
- Name, email address, and best contact phone number.

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



Cardinal Resources for Localities

Key locality resources are located at www.cardinalproject.virginia.gov/localityusers

Helpful Resources for the TLC Data Sheet and TLC Contacts Page

- [BN361 TLC Data Sheet Locality](#) job aid
- [BN361 TLC Contacts Locality](#) job aid
- **Cardinal Enrollment Report (RBN350)**: Lists all employees and COBRA members enrolled in Healthcare on a specific date.
 - For more information, refer to the [Cardinal HCM Benefits Reports Catalog](#) (pages 56 – 57)
- [NAV225 Generating an HCM Report](#) job aid

Start soon...

TLC Data Sheet Entry and Certification is due by Tuesday, April 1 for all July renewals!

TLC Data Sheet Entry and Certification dates for October renewals will be communicated at a later date.





Thank You for Attending

Cardinal

Appendix Security & Access



Cardinal Security Resources

Security forms and associated resources are available on the [Cardinal website](#) > Resources > [Security](#).

Locality specific forms, handbook, instructions, and Department ID list are located under the **TLC Locality User Access** section of the page.

Localities **must** use the Locality Security Access Form.



Search (for job aids, videos, or other sup

Home / Security

Security

Cardinal access is granted based on specific work that an employee needs to perform in the system and the associated security roles set up by their agency/locality. Specific documentation needs to be submitted to the Cardinal Security team before access can be granted. Please refer to the information below to learn how to gain access to Cardinal. Using Cardinal for the first time? Please reference the [Cardinal Portal](#) page.

Statewide User Access

- Statewide Security Handbook
- Statewide Security Access Form (SE-SW-001)
- Instructions for Security Access Form (SE-SW-001)
- Primary Permission List
- Roles-to-Training Course Mapping

The **Cardinal Security Form** must be completed by the agency's **Cardinal Security Officer (CSO)**. The form should include required signatures prior to submitting to the Cardinal Security Team, in order for access to be granted in Cardinal.

Statewide Security Forum for the CSO Video: [Security Access and Form Forum](#)

VDOT User Access

- VDOT Security Handbook
- VDOT Security Access Form (SE-50100-001)
- Instructions for Security Access Form (SE-50100-001)
- Primary Permission List
- Roles-to-Training Course Mapping

The **Cardinal Security Form** must be completed by the agency's **Cardinal Security Officer (CSO)**. The form should include required signatures prior to submitting to the Cardinal Security Team, in order for access to be granted in Cardinal.

TLC Locality User Access

- Locality Security Handbook
- Locality Security Access Form (SE-LOCALITY-001)
- Instructions for Security Access Form (SE-LOCALITY-001)
- TLC Locality Cardinal HCM Department ID List

The **Cardinal Locality Security Form** must be submitted directly to The Local Choice (TLC).

Audit Access

- Audit Security Access Form (SE-AUDIT-001)
- Instructions for Audit Security Access Form (SE-AUDIT-001)

Interface File Access

- Interface Account Request Form (SE-SW-002)
- Instructions for Interface Account Request Form

The **Cardinal Interface Account Request Form (SE-SW-002)** must be completed by the agency's technical resource in order to establish access/exchange interface files with Cardinal. The form should include the required signatures prior to submitting the form to the Cardinal Interface team.



Access in Cardinal HCM

Core User access is required to complete the TLC Data Sheet certification. Core Users who have not logged in to Cardinal within the last 90 days will not be able to access the TLC Data Sheet.

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.

Lost Access?

Localities

Submit a [Locality Security Access form](#) to TLC@dhrm.virginia.gov.

The TLC group at DHRM reviews and approves the request and forwards the request to the Cardinal Security Team.

Once access has been established or updated, the Cardinal Security team notifies the Core User via email.



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 are 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.