Human Capital Management (HCM)

The Local Choice (TLC) Data Sheet Forum

March 6, 2024

Agenda

- TLC OHB Introduction
- TLC Data Sheet – What’s New?
  - New TLC Data Sheet Features
  - New TLC Contacts Page
  - New TLC Report
- Demo
- TLC Data Sheet – Updating & Certifying
- Questions
- Support
- Meeting Wrap-Up

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

Introduction

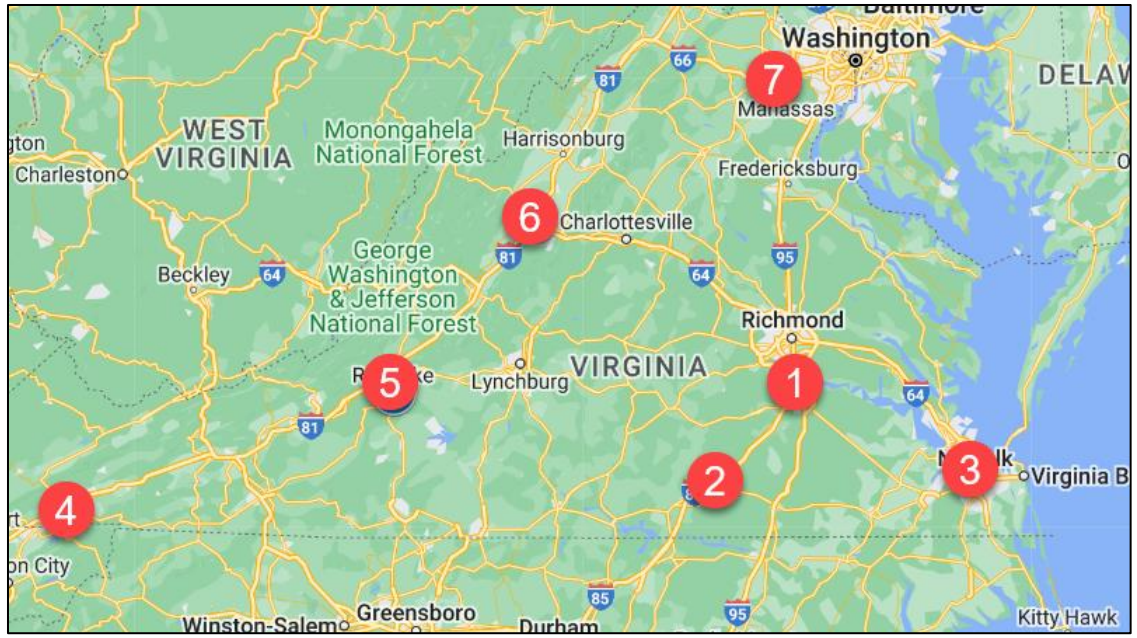
Welcome from TLC OHB Group

Reminder: Today's forum is solely dedicated to the discussion/training on The Local Choice Data Sheet.

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

The TLC 2024 Regional Meetings will be held between **February 28** and **March 19** throughout the Commonwealth.

Detailed information is provided on the TLC website > Group Benefits Administrators > Communications > BA Memos > 24-01 - 2/14/24 - 2024 TLC Regional Meetings.



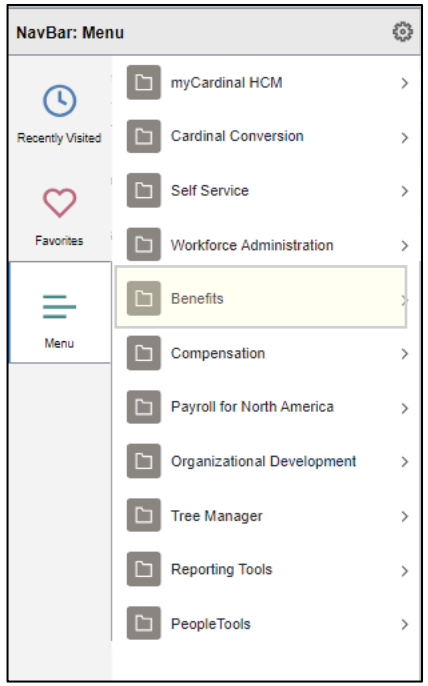
We look forward to seeing you!

TLC Data Sheet Timeline

TLC Data Sheet Entry and Certification is due by **Monday, 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

What’s New?

TLC Data Sheet: New Features

No Need to Add a New Row

- Make changes directly to the data sheet! Save your work and return later to finish without needing to add a new row.

ACA Reporting Indicator

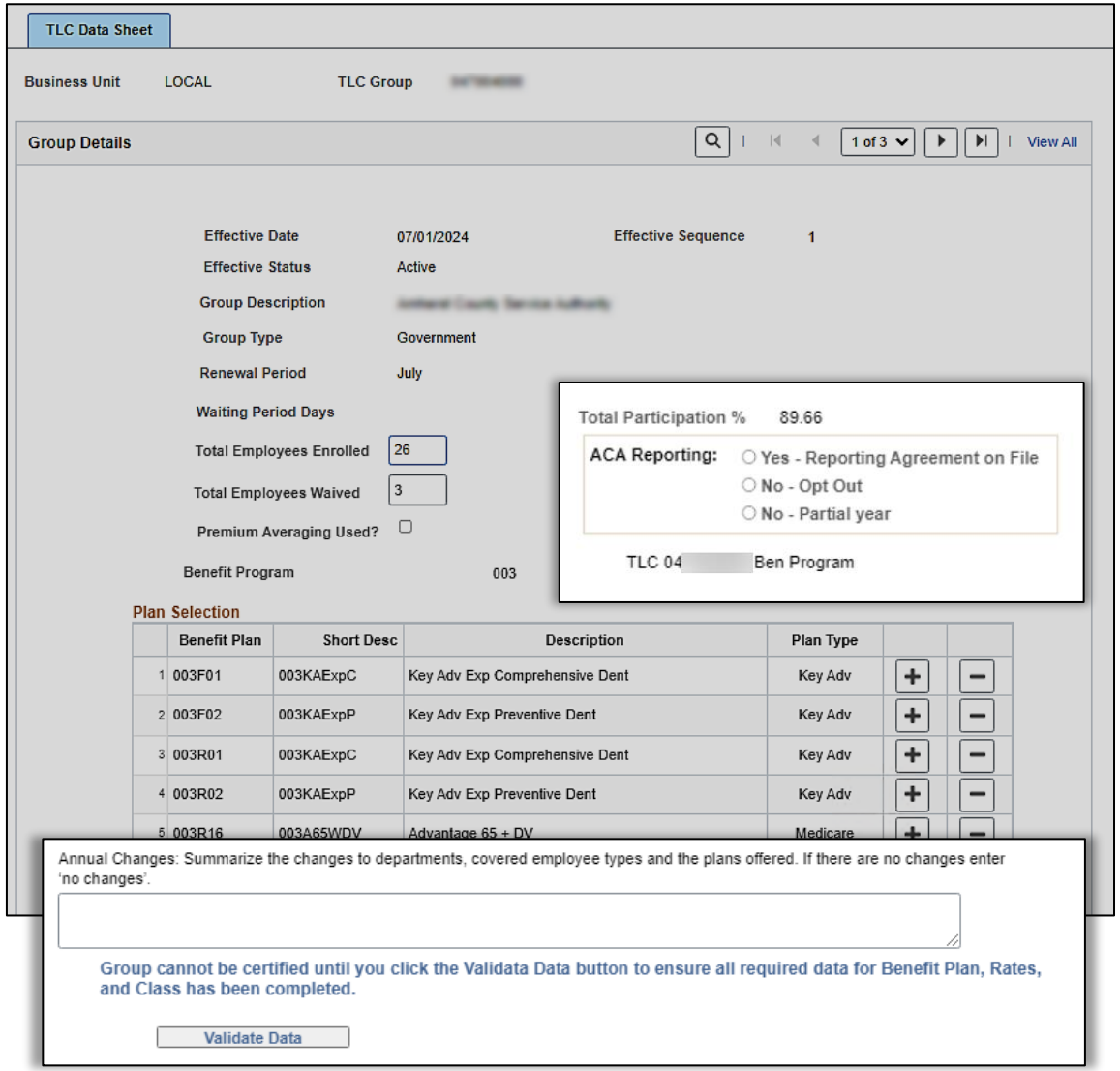
- Indicate your ACA reporting preference. Selecting **No** will result in ACA forms not being produced for your group.

New Informational Messages

- Pop-up informational boxes will occur during processes like adding/removing a plan.

New Comments Field

- Required field to summarize changes and provide important details.
- No changes? Simply type “No Changes”.

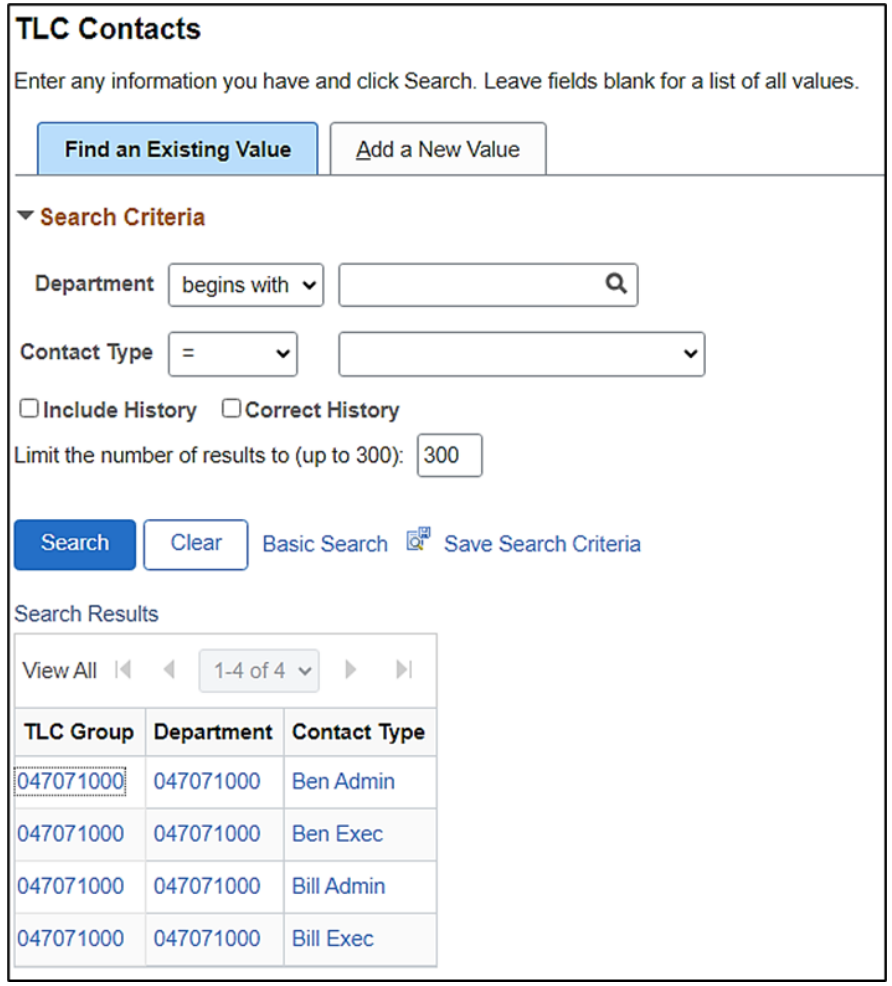


New TLC Contacts Page

Menu > Benefits > Employer Information > TLC Contacts

Dedicated page to enter and maintain TLC Contacts

- Access page at any time
- Enter each contact separately



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 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

X	Government Group		School Group		Government &School Group		Grandfathered Government &School Group
X	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.

X	This group has one Group ID and one FEIN.
	This group has more than one Group ID and one FEIN.
	This group has more than one Group ID and more than one FEIN.
Primary ID	

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

X	Rule 1: No waiting period	0	Number of days allowed to make the enrollment election request	30
	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:	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

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

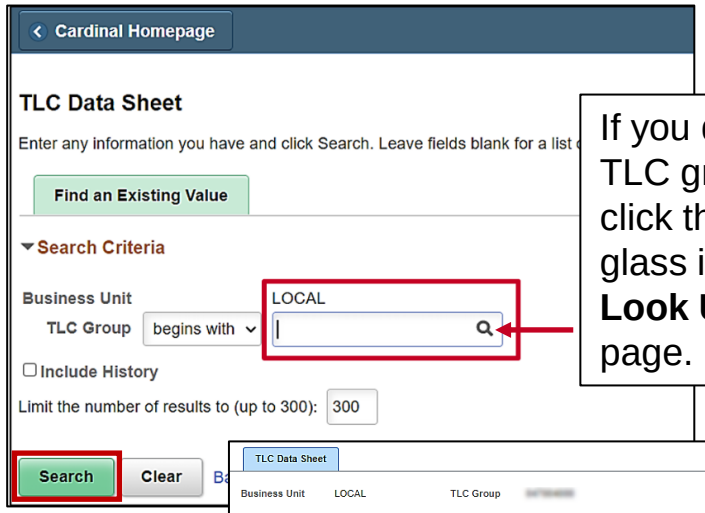
Open your Locality's Data Sheet

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

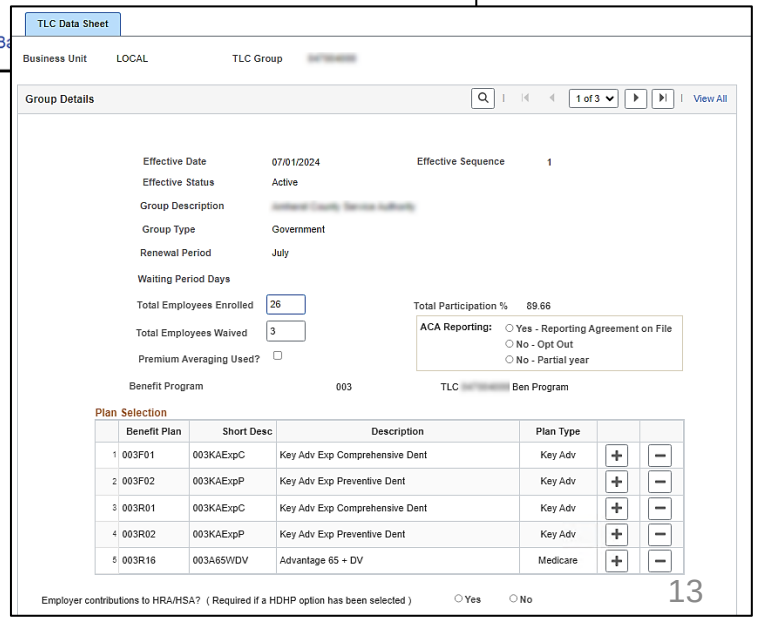
The TLC Data Sheet Search page displays, enter your **TLC group number**.

Click **Search.**

The **TLC Data Sheet** will display.



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



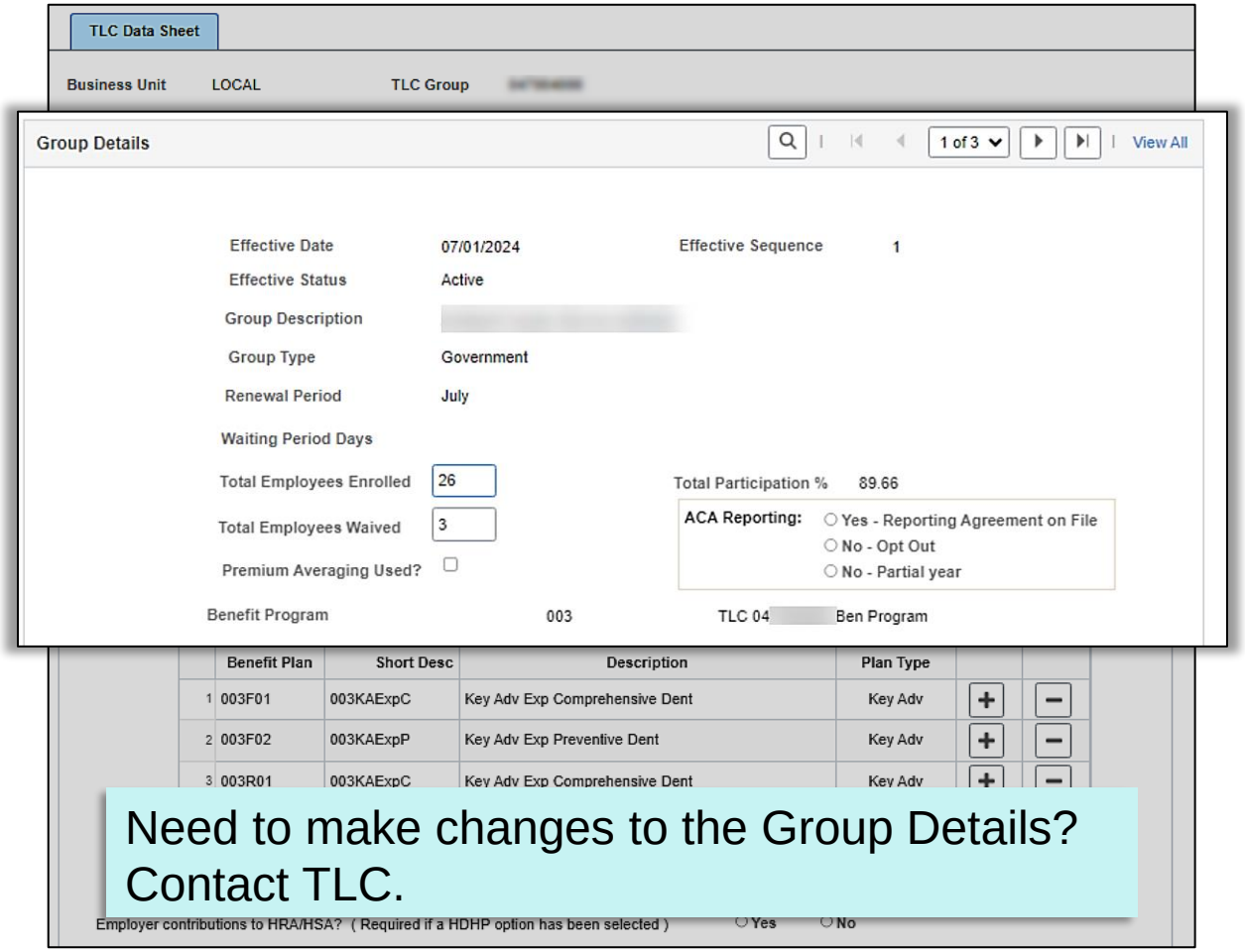
Review Group Details

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



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

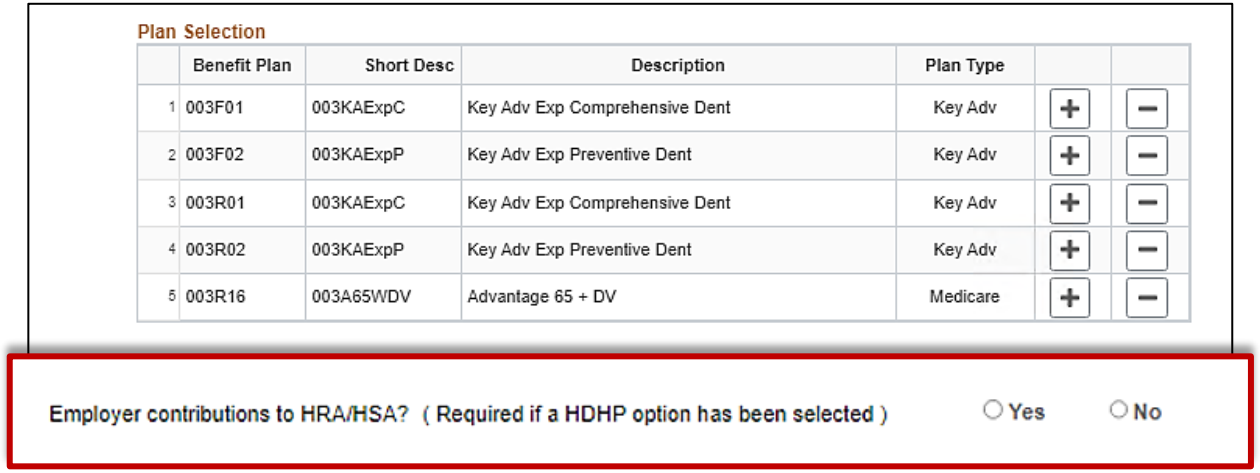
Make Changes to Plan Selection

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	+	−
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

Do current plans auto populate on the Data Sheet?

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

Departments: Rates

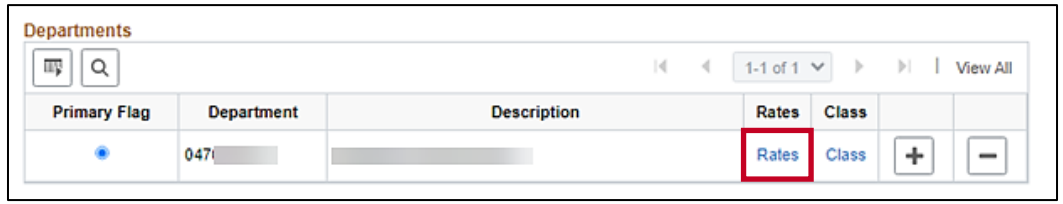
The Premium Rates page will display only rows for the Benefit Plans selected in the Plan Selection section.

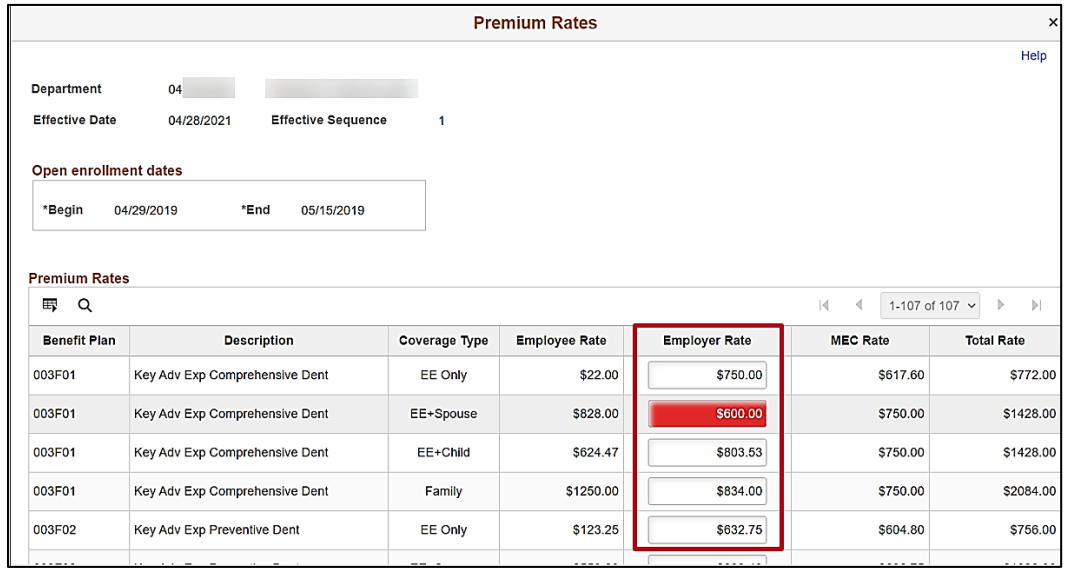
Enter the applicable Employer Rate in the **Employer Rate** field.

- 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.



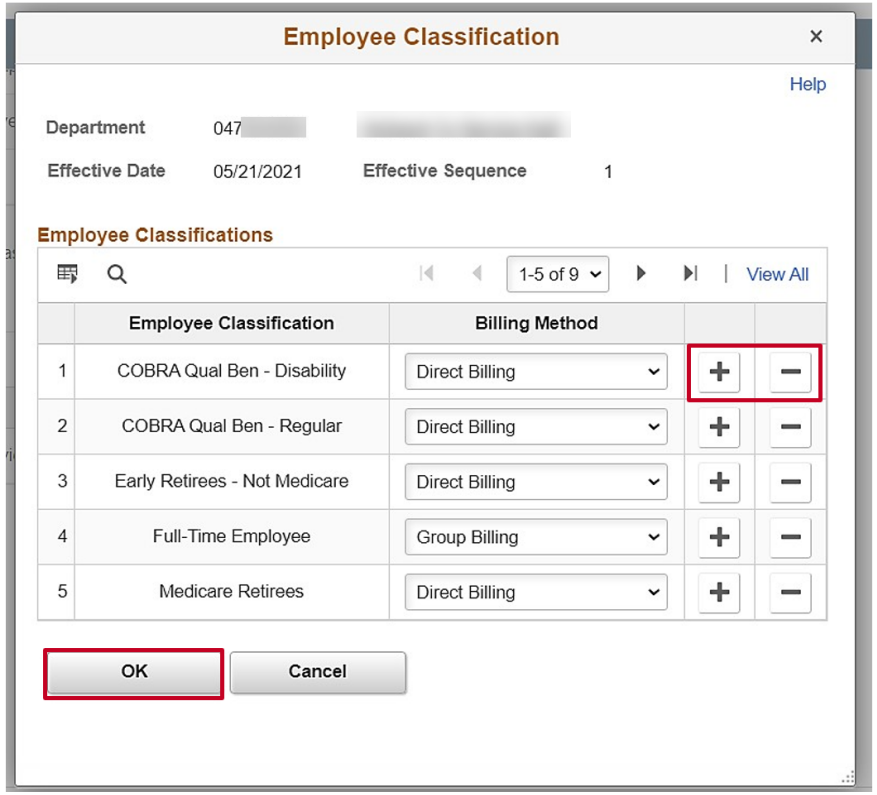


Departments: Employee Classification

Class will carry over from the prior year.

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

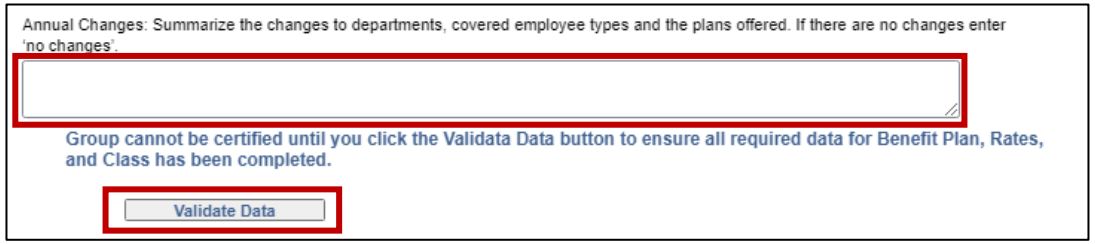
- The only mandatory Employee Classification is Full-Time Employee.
- For each Employee Classification a Billing method must be selected.
- The Billing Method options are Direct Billing, Group Billing, or Third-Party Administrator.



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**

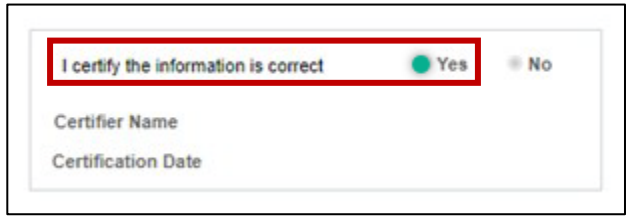


Click on **Validate Data** to verify all the information has been added correctly.

- **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.

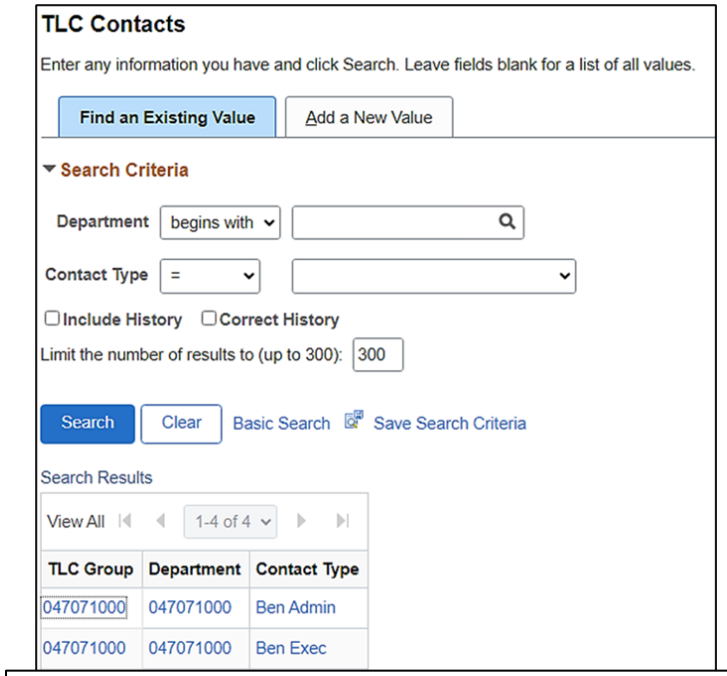
Once saved, the Certifier Name and Certification Date will auto populate with the person logged in and the current date.

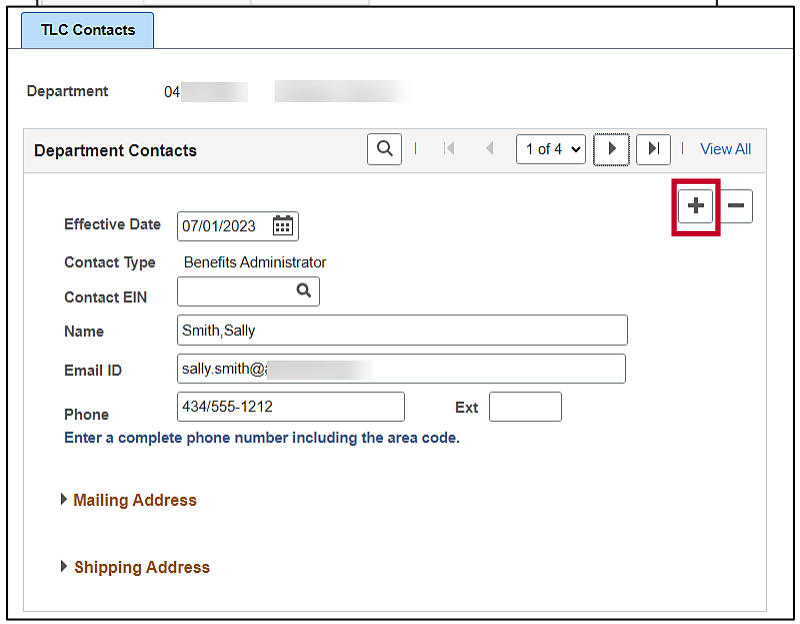


New TLC Contacts Page

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.





Questions?

Support

TLC Support

Contact TLC

- Questions about the content of the TLC Data Sheet?
- Need to change Group Details on the TLC Data Sheet?
- 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 Website Page for Localities

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

Helpful Job Aids for the TLC Data Sheet and TLC Contacts Page

- BN361_TLC Data Sheet_Locality
- BN361_TLC Contacts_Locality
- NAV225_Generating an HCM Report

Forum presentation and recording will be posted on the website once it is available.

Start soon…

TLC Data Sheet Entry and Certification is due by Monday, 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

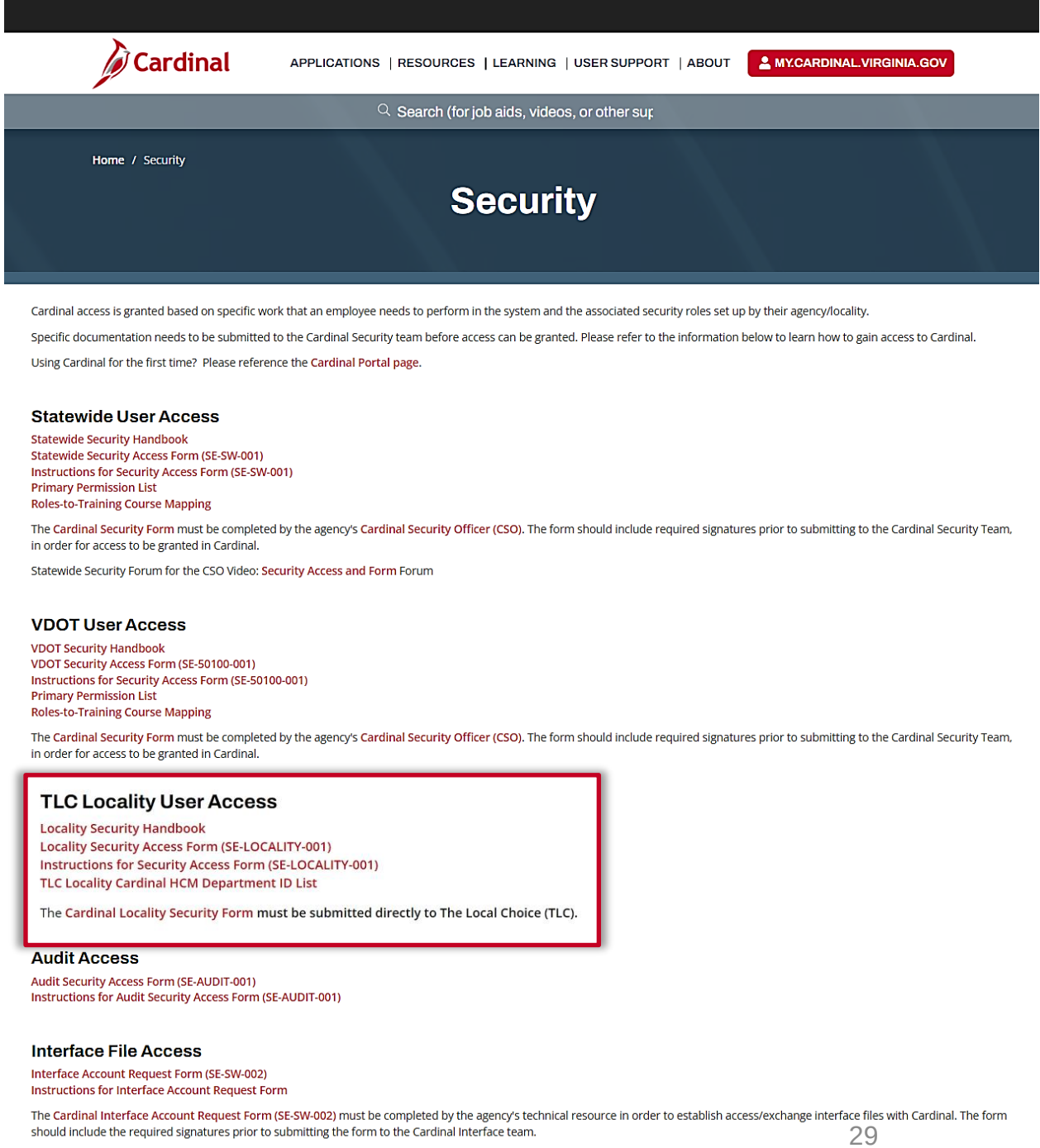
Appendix
Security & Access

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.



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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.

*More information regarding the Forgot Username/Forgot Password Request is available on my.cardinal.virginia.gov