

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 TLC Contacts, refer to the Job Aid titled **TLC Contacts**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.

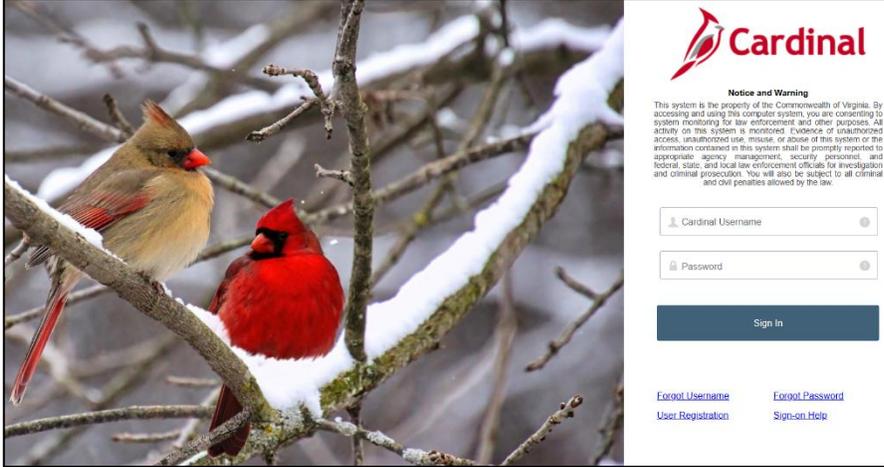
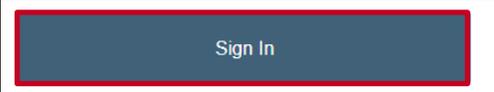
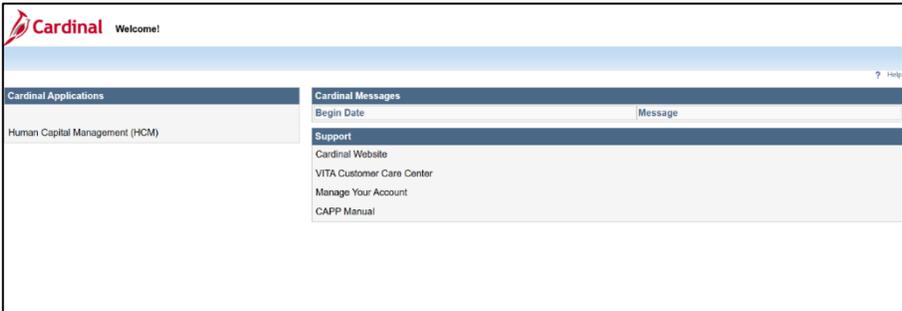
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Revision History

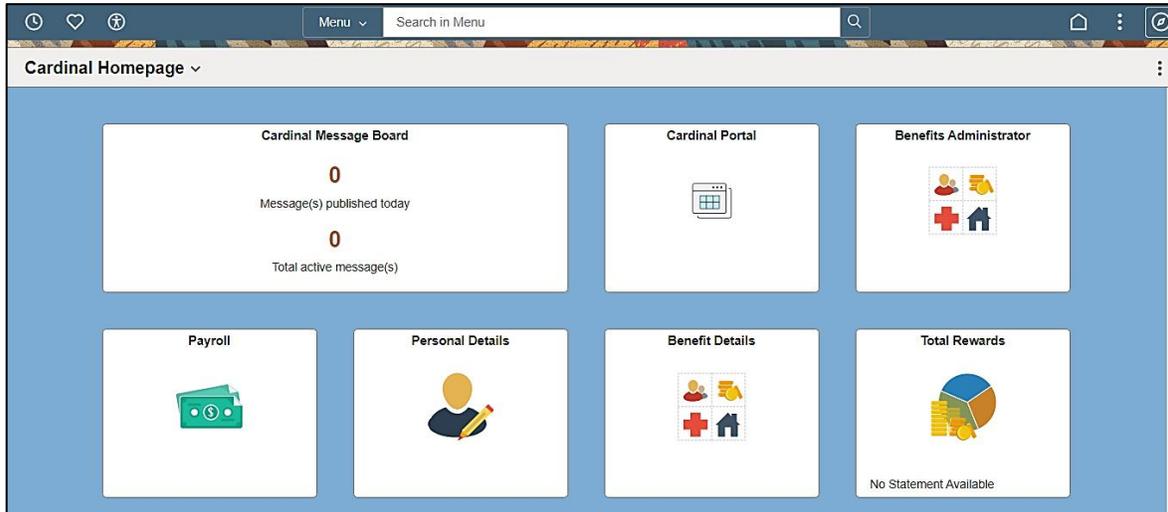
Revision Date	Summary of Changes
3/1/2025	Added the Cardinal Login steps. Updated the screenshots of the Search pages (Section 1 ; after Step 5). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.

Updating an Existing TLC Plan using the TLC Data Sheet

Step	Action
1.	Log into Cardinal (my.cardinal.virginia.gov).
<p>The Cardinal Login page displays.</p> 	
2.	<p>Enter the Employee Username and Password in the Cardinal Username and Password field.</p> 
3.	<p>Click the Sign In button.</p> 
<p>The Portal Welcome page displays.</p> 	

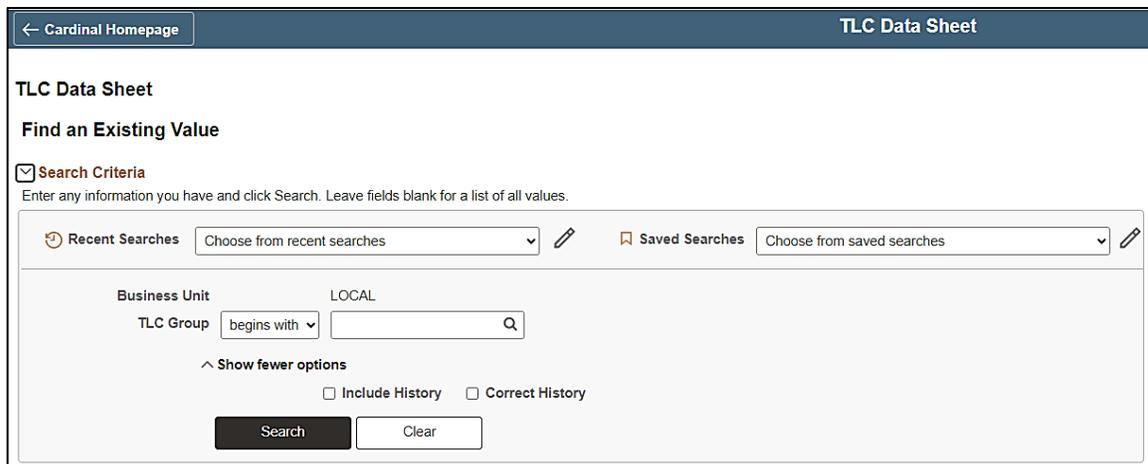
Step	Action
4.	Click the Human Capital Management link. 

The **Cardinal Homepage** displays.



5.	To update an existing TLC Plan, navigate to the TLC Data Sheet page by following this path: NavBar > Menu > Benefits > Employer Information > TLC Data Sheet
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The **TLC Data Sheet Find an Existing Value Search** page displays.



	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled Overview of the Cardinal HCM Search Pages . This Job Aid is located on the Cardinal website in Job Aids under Learning .
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Step	Action
6.	<p>The Business Unit field defaults to “LOCAL” and cannot be changed.</p> <p>Enter or select the applicable TLC Group Number using the TLC Group Look up icon (magnifying glass).</p> <p>Note: Only the TLC Groups that the user has security access to will display for selection.</p> <div data-bbox="263 508 1026 625" style="border: 1px solid black; padding: 5px;"> <p>Business Unit LOCAL</p> <p>TLC Group begins with <input type="text"/> <input type="button" value="Q"/></p> </div>
7.	<p>Click the Search button.</p> <div data-bbox="263 709 768 793" style="border: 1px solid black; padding: 5px;"> <p><input type="button" value="Search"/> <input type="button" value="Clear"/></p> </div>

The **TLC Data Sheet** page displays for the applicable TLC Group.

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 Employees Waived

Premium Averaging Used?

Total Participation % 89.66

ACA Reporting: Yes - Reporting Agreement on File
 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

Step	Action
8.	<p>Review/update the following fields displayed in the Group Details section as applicable:</p> <ul style="list-style-type: none"> • 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. <p>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.</p> <ul style="list-style-type: none"> • 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. • 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. • 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. • 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. • Total Employees Enrolled: Number of employees selecting coverage. Update as applicable. • Total Employees Waived: Number of employees waiving coverage. Update as applicable. • 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. • 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. • 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). • 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.
	<p>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.</p>

Step	Action
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10. To change Plan Selections, choose the following options, as applicable:

- Click the **Add a New Row (+)** icon to insert a Benefit Plan
- Click the **Delete Row (-)** icon to delete a Benefit Plan

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



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.

11. 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.

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

12. Scroll down to the **Departments** section as needed.

Departments section:

Departments						
Primary Flag	Department	Description	Rates	Class		
●	047004000	Amherst Co Service Auth	Rates	Class	+	-

Step	Action														
	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.														
13.	<p>Click the Rates link for the corresponding Department.</p> <div data-bbox="261 510 1442 730" style="border: 1px solid black; padding: 5px;"> <p>Departments</p> <p> <input type="text"/> 1-1 of 1 View All </p> <table border="1"> <thead> <tr> <th>Primary Flag</th> <th>Department</th> <th>Description</th> <th>Rates</th> <th>Class</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">●</td> <td>047004000</td> <td>Amherst Co Service Auth</td> <td style="border: 2px solid red;">Rates</td> <td>Class</td> <td style="text-align: center;">+</td> <td style="text-align: center;">-</td> </tr> </tbody> </table> </div>	Primary Flag	Department	Description	Rates	Class			●	047004000	Amherst Co Service Auth	Rates	Class	+	-
Primary Flag	Department	Description	Rates	Class											
●	047004000	Amherst Co Service Auth	Rates	Class	+	-									

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

Premium Rates x

[Help](#)

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
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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	\$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

	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.
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Step	Action																																										
14.	Enter the applicable employer rate amounts in the Employer Rate fields for all of the benefit plans listed. <div data-bbox="261 411 1403 720" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Premium Rates</p> <p>🔍 Q 1-107 of 107</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">Benefit Plan</th> <th style="width: 30%;">Description</th> <th style="width: 10%;">Coverage Type</th> <th style="width: 10%;">Employee Rate</th> <th style="width: 10%;">Employer Rate</th> <th style="width: 10%;">MEC Rate</th> <th style="width: 10%;">Total Rate</th> </tr> </thead> <tbody> <tr> <td>003F01</td> <td>Key Adv Exp Comprehensive Dent</td> <td>EE Only</td> <td>\$308.80</td> <td><input type="text" value="\$463.20"/></td> <td>\$617.60</td> <td>\$772.00</td> </tr> <tr> <td>003F01</td> <td>Key Adv Exp Comprehensive Dent</td> <td>EE+Spouse</td> <td>\$571.20</td> <td><input type="text" value="\$856.80"/></td> <td>\$617.60</td> <td>\$1428.00</td> </tr> <tr> <td>003F01</td> <td>Key Adv Exp Comprehensive Dent</td> <td>EE+Child</td> <td>\$571.20</td> <td><input type="text" value="\$856.80"/></td> <td>\$617.60</td> <td>\$1428.00</td> </tr> <tr> <td>003F01</td> <td>Key Adv Exp Comprehensive Dent</td> <td>Family</td> <td>\$833.60</td> <td><input type="text" value="\$1250.40"/></td> <td>\$617.60</td> <td>\$2084.00</td> </tr> <tr> <td>003F02</td> <td>Key Adv Exp Preventive Dent</td> <td>EE Only</td> <td>\$302.40</td> <td><input type="text" value="\$453.60"/></td> <td>\$604.80</td> <td>\$756.00</td> </tr> </tbody> </table> </div>	Benefit Plan	Description	Coverage Type	Employee Rate	Employer Rate	MEC Rate	Total Rate	003F01	Key Adv Exp Comprehensive Dent	EE Only	\$308.80	<input type="text" value="\$463.20"/>	\$617.60	\$772.00	003F01	Key Adv Exp Comprehensive Dent	EE+Spouse	\$571.20	<input type="text" value="\$856.80"/>	\$617.60	\$1428.00	003F01	Key Adv Exp Comprehensive Dent	EE+Child	\$571.20	<input type="text" value="\$856.80"/>	\$617.60	\$1428.00	003F01	Key Adv Exp Comprehensive Dent	Family	\$833.60	<input type="text" value="\$1250.40"/>	\$617.60	\$2084.00	003F02	Key Adv Exp Preventive Dent	EE Only	\$302.40	<input type="text" value="\$453.60"/>	\$604.80	\$756.00
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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.

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

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

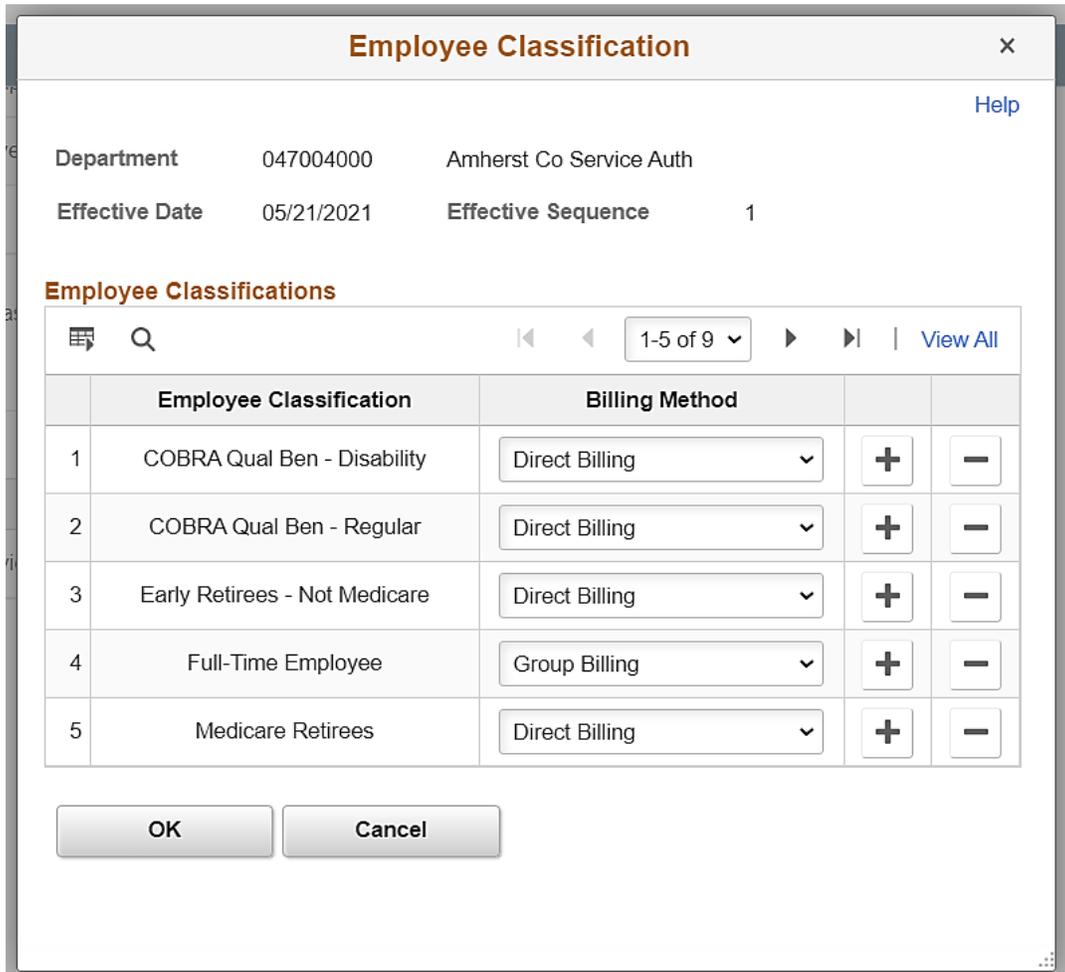
Premium Rates

🔍
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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

Step	Action										
15.	Once all of the employer rates are entered with no errors, click the OK button at the bottom of the page.										
16.	<p>The TLC Data Sheet page redisplay.</p> <p>Scroll down as needed and click the Class link within the Departments section.</p> <div data-bbox="261 525 1442 745" data-label="Complex-Block">  <p>Departments</p> <p>1-1 of 1 View All</p> <table border="1"> <thead> <tr> <th>Primary Flag</th> <th>Department</th> <th>Description</th> <th>Rates</th> <th>Class</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="radio"/></td> <td>047004000</td> <td>Amherst Co Service Auth</td> <td>Rates</td> <td>Class <input type="button" value="+"/> <input type="button" value="-"/></td> </tr> </tbody> </table> </div>	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="-"/>
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="-"/>							

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



Employee Classification [X] [Help](#)

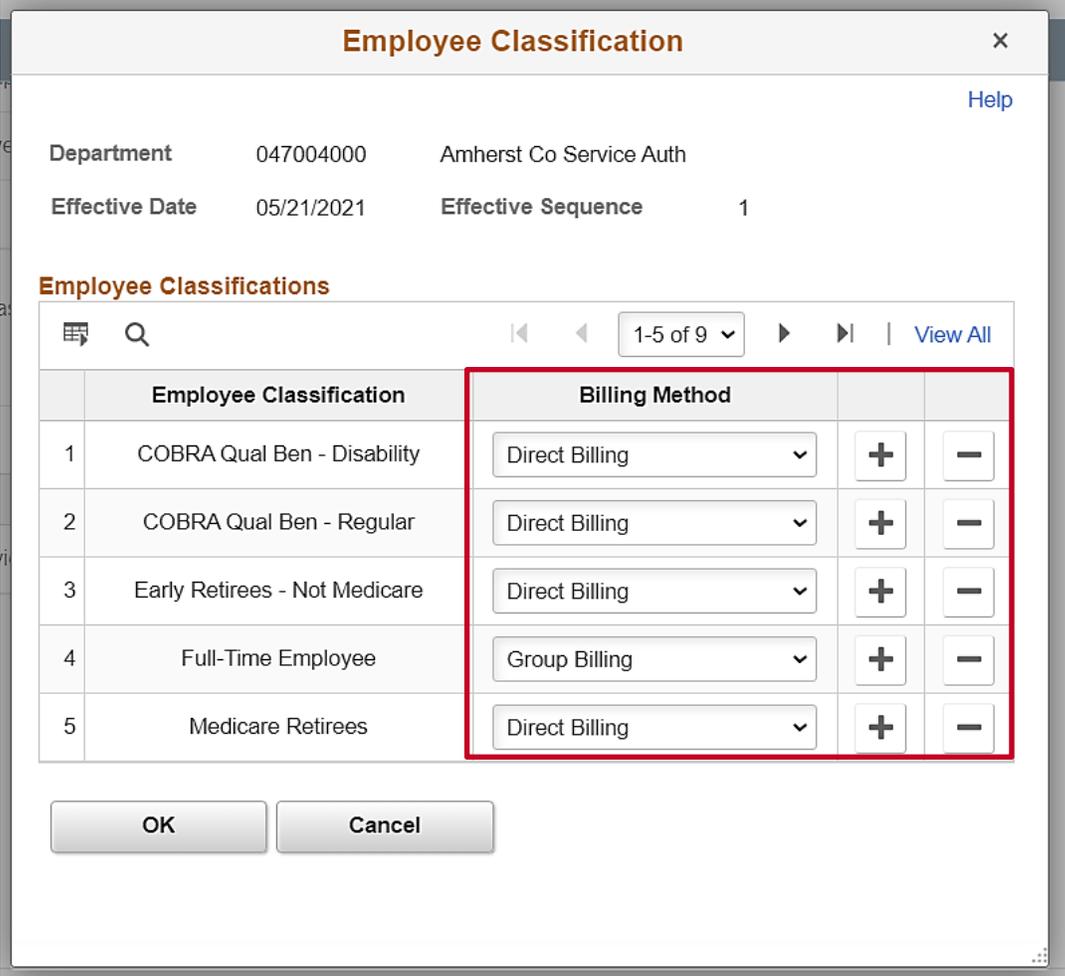
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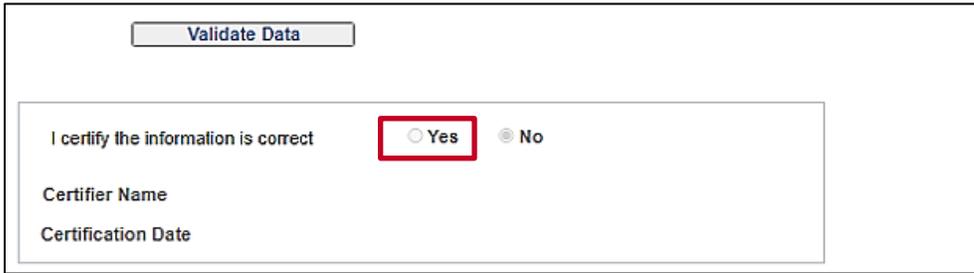
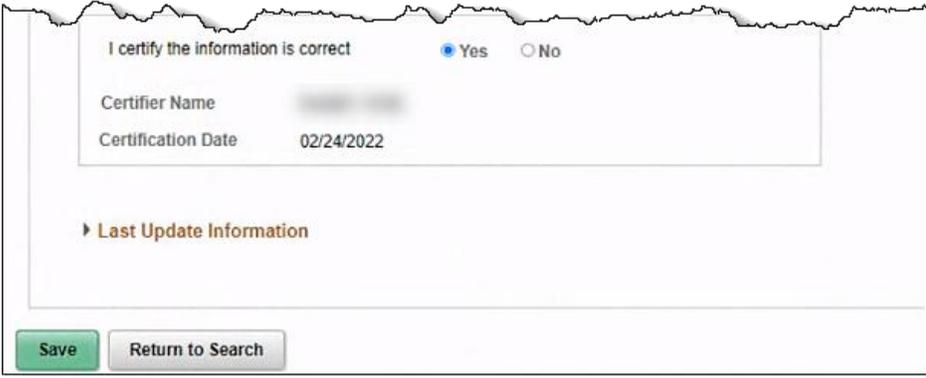
Employee Classifications

1-5 of 9 | View All

	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="-"/>

Step	Action																								
17.	<p>Use the corresponding Add a New Row icon (+) or Delete Row icon (-) to add or remove classes and update the Billing Method fields as needed.</p> <p>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”.</p>  <table border="1" data-bbox="300 892 1274 1285"> <thead> <tr> <th>Employee Classification</th> <th>Billing Method</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>1 COBRA Qual Ben - Disability</td> <td>Direct Billing</td> <td>+</td> <td>-</td> </tr> <tr> <td>2 COBRA Qual Ben - Regular</td> <td>Direct Billing</td> <td>+</td> <td>-</td> </tr> <tr> <td>3 Early Retirees - Not Medicare</td> <td>Direct Billing</td> <td>+</td> <td>-</td> </tr> <tr> <td>4 Full-Time Employee</td> <td>Group Billing</td> <td>+</td> <td>-</td> </tr> <tr> <td>5 Medicare Retirees</td> <td>Direct Billing</td> <td>+</td> <td>-</td> </tr> </tbody> </table>	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	+	-
Employee Classification	Billing Method																								
1 COBRA Qual Ben - Disability	Direct Billing	+	-																						
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3 Early Retirees - Not Medicare	Direct Billing	+	-																						
4 Full-Time Employee	Group Billing	+	-																						
5 Medicare Retirees	Direct Billing	+	-																						
18.	<p>Once all the required updates are made, click the OK button.</p> 																								

Step	Action
19.	<p>The TLC Data Sheet page redisplay.</p> <p>Scroll down and 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 no changes were made, enter "No changes". This field is required.</p> <div data-bbox="263 527 1422 779" style="border: 1px solid black; padding: 5px;"> <p>Annual Changes: Summarize the changes to departments, covered employee types and the plans offered. If there are no changes enter 'no changes'.</p> <div style="border: 2px solid red; height: 20px; width: 100%;"></div> <p>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.</p> <p style="text-align: center;"><input type="button" value="Validate Data"/></p> </div>
20.	<p>Click the Validate Data button to verify that all the information has been added correctly.</p> <div data-bbox="263 867 561 919" style="border: 1px solid black; padding: 5px;"> <p style="text-align: center;"><input style="border: 2px solid red;" type="button" value="Validate Data"/></p> </div>
<p>A Confirmation message displays in a pop-up window.</p> <div data-bbox="237 1005 1403 1203" style="border: 2px solid gray; padding: 10px; text-align: center;"> <p>Benefit Plan, Rates, and Class validations were successful. You may now attempt to certify this group by clicking YES below. (0,0)</p> <p style="margin: 0;"><input style="border: 1px dashed blue;" type="button" value="OK"/></p> </div>	
	<p>If any errors or missing information are found, a warning message will appear to let the user know what piece of information needs to be edited/fixed. If a message appears, take the necessary steps to fix the error before continuing.</p>
21.	<p>Click the OK button to close the Confirmation message.</p> <div data-bbox="263 1425 1430 1623" style="border: 2px solid gray; padding: 10px; text-align: center;"> <p>Benefit Plan, Rates, and Class validations were successful. You may now attempt to certify this group by clicking YES below. (0,0)</p> <p style="margin: 0;"><input style="border: 2px solid red;" type="button" value="OK"/></p> </div>

Step	Action
22.	<p>The TLC Data Sheet page redisplay.</p> <p>Scroll down as needed and click the Yes radio button beside the I certify the information is correct statement.</p> 
23.	<p>Click the Save button at the bottom of the page.</p>
	<p>Once saved, the page refreshes and Certifier Name and Certification Date fields will automatically populate with the certifier's name and the current date.</p>  <p>Once certified, no further changes can be made in Cardinal. If any changes need to be made, contact the TLC Group at OHB.</p>
24.	<p>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 an 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.</p>