

Running the TLC Data Sheet Report Overview

Prior to each new plan year, the TLC Data Sheet is created using the existing group profile information and plan selections chosen the previous year. Localities should review and update as appropriate. Once the Data Sheet information is entered, validated, and certified, Localities have the opportunity to run the TLC Data Sheet Report, which provides a PDF version of the TLC Data Sheet for recordkeeping. This Job Aid walks users through the steps to run the TLC Data Sheet Report.

Note: This Report should be run after submitting your TLC Datasheet changes.

This report can be run for:

- All of a user's TLC groups: This includes both main groups and any subgroups
- A specific TLC group: Users can choose to see the report for just one particular group

For instructions on entering and updating the TLC Data Sheet or your Locality's TLC Contacts, refer to the Job Aids titled **BN361 TLC Data Sheet Locality** and **BN361 TLC Contacts Locality**, located on the Cardinal website in **Job Aids** under **Learning**.

To find your Locality's Company and Department codes, see the Job Aid titled **TLC Cardinal Locality – Company and Department Codes** located on the Cardinal website in **Job Aids** under **Learning**.



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Revision History 3

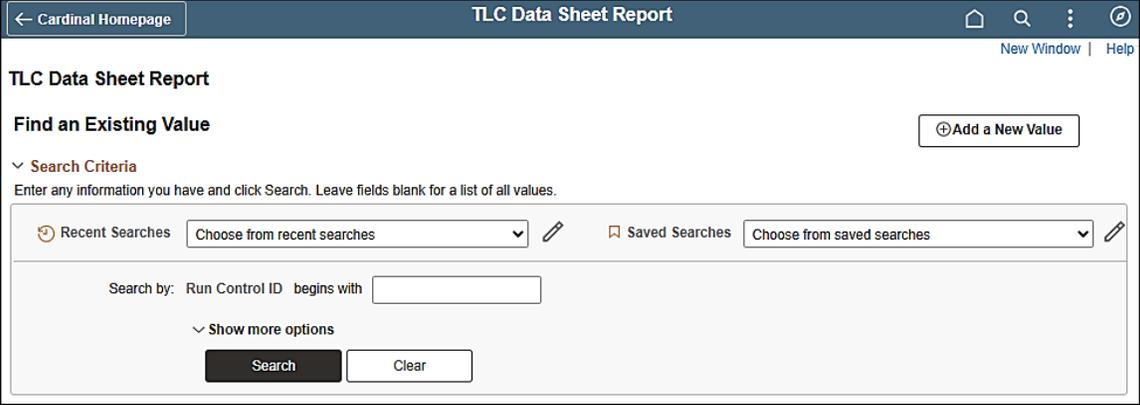
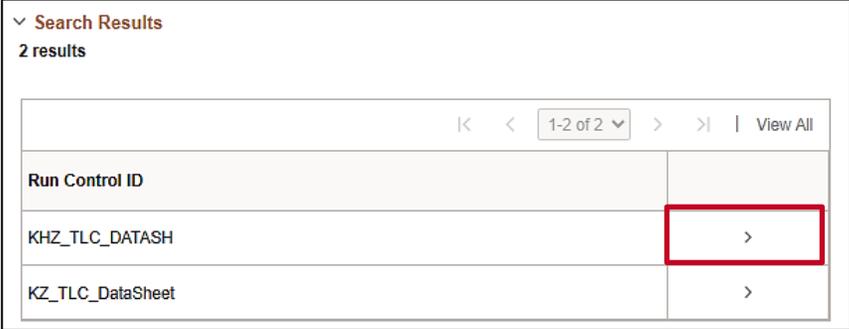
Running the TLC Data Sheet Report..... 4



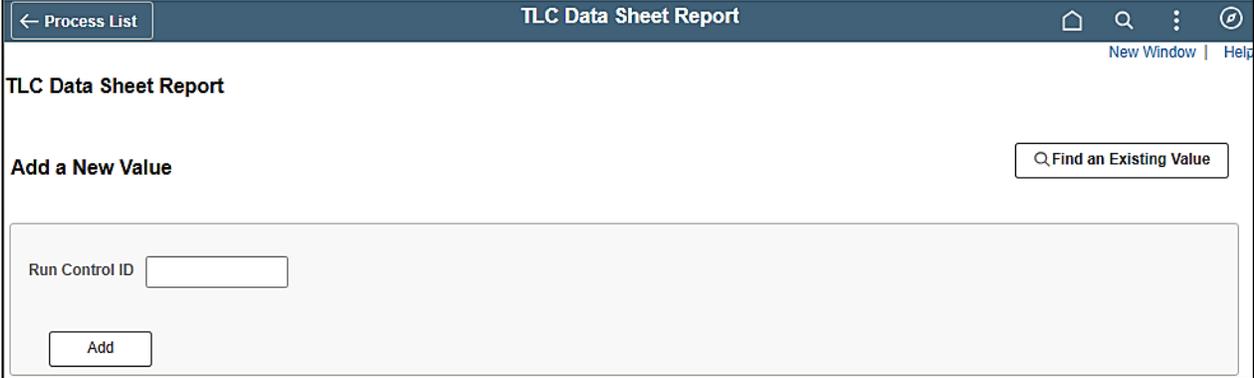
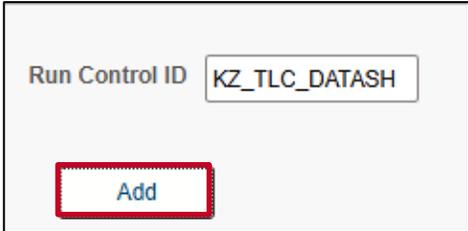
Revision History

Revision Date	Summary of Changes
2/18/2026	Baseline.

Running the TLC Data Sheet Report

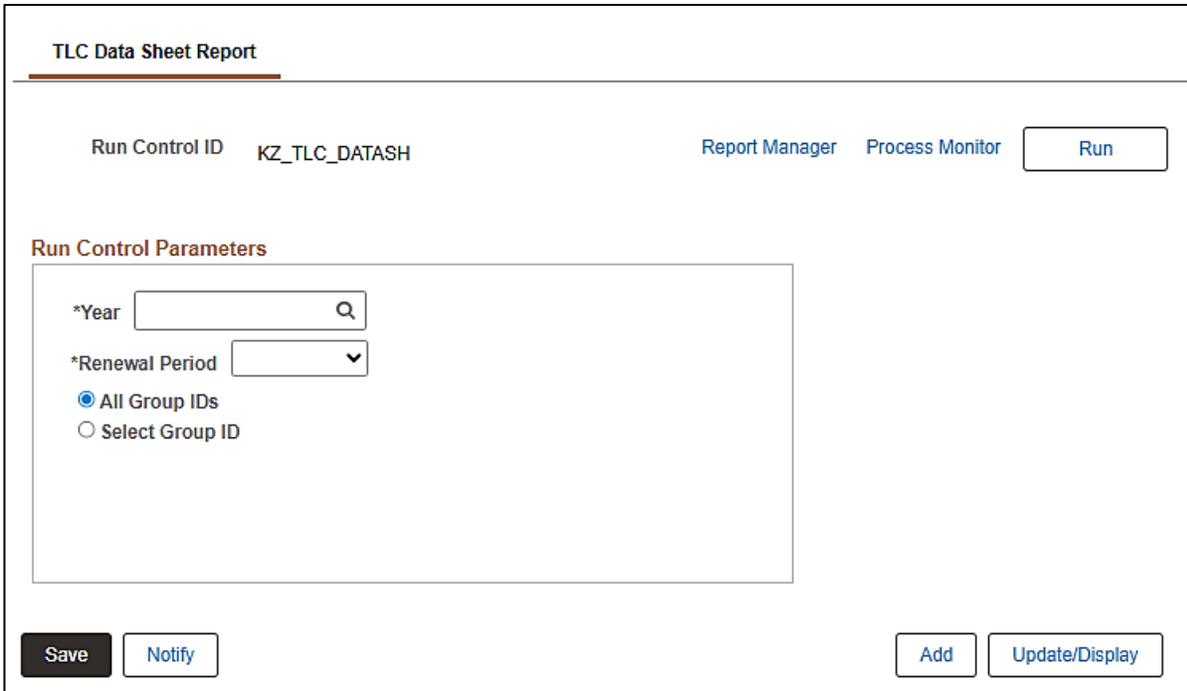
Step	Action
1.	Navigate to the TLC Data Sheet Report using the following path: NavBar > Menu > Benefits > Employer Information > TLC Data Sheet Report
<p>The TLC Data Sheet Report Find an Existing Value page displays.</p> 	
1.	Click the Search button to see if a Run Control ID already exists for the report. 
	<p>A Run Control ID is required to run reports in Cardinal.</p> <p>Once a Run Control ID has been created by a user for a report, it does not have to be recreated and will display when the Search button is clicked.</p> <p>Users should always do a search before creating a new Run Control ID.</p>
3.	If multiple results display, click Drill in icon on the desired Run Control ID row and proceed to Step 9 . 

Step	Action								
4.	<p>If only one Run Control ID exists, Cardinal will open the Run Control page for the report. Proceed to Step 9.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p style="text-align: center; margin: 0;">TLC Data Sheet Report</p> <hr/> <p style="margin: 5px 0;">Run Control ID KHZ_TLC_DATASH Report Manager Process Monitor Run</p> <p style="margin: 10px 0;">Run Control Parameters</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> <p>*Year <input type="text" value="2025-2026"/> <input type="button" value="Q"/></p> <p>*Renewal Period <input type="text" value="July"/> <input type="button" value="v"/></p> <p><input type="radio"/> All Group IDs</p> <p><input checked="" type="radio"/> Select Group ID</p> <p>Select Group ID</p> <div style="border: 1px solid #ccc; padding: 2px; margin: 2px 0;"> <input type="text"/> <input type="button" value="Q"/> < < 1-1 of 1 > > </div> <table border="1" style="width: 100%; border-collapse: collapse; margin: 2px 0;"> <thead> <tr> <th style="width: 5%;">#</th> <th style="width: 70%;">TLC Group</th> <th style="width: 10%;"></th> <th style="width: 15%;"></th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">1</td> <td><input type="text"/></td> <td style="text-align: center;"><input type="button" value="Q"/></td> <td style="text-align: center;"> <input type="button" value="+"/> <input type="button" value="-"/> </td> </tr> </tbody> </table> </div> <p style="margin: 10px 0;"> Save Return to Search Notify Add Update/Display </p> </div>	#	TLC Group			1	<input type="text"/>	<input type="button" value="Q"/>	<input type="button" value="+"/> <input type="button" value="-"/>
#	TLC Group								
1	<input type="text"/>	<input type="button" value="Q"/>	<input type="button" value="+"/> <input type="button" value="-"/>						
5.	<p>If no Run Control ID exists, Cardinal will display “No matching values were found.” Proceed to the next Step.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p style="margin: 0;">∨ Search Results</p> <p style="margin: 5px 0; font-weight: bold;">No matching values were found.</p> </div>								
6.	<p>Click the Add a New Value button.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <div style="border: 2px solid red; padding: 5px; display: inline-block;"> + Add a New Value </div> </div>								

Step	Action
<p>The TLC Data Sheet Report Add a New Value page displays.</p> 	
7.	<p>Enter a Run Control ID for this report in the Run Control ID field.</p> 
	<p>The Run Control ID serves as a name for a set of saved report parameters and must be unique. A Run Control ID cannot exceed 30 characters and cannot contain spaces or wildcard symbols, but underscore characters are permitted.</p> <p>Once a Run Control ID is created and saved it cannot be deleted.</p>
8.	<p>Click the Add button.</p> <p>Note: For this example, a Run Control ID of KZ_TLC_DATASH has been used.</p> 

Step	Action
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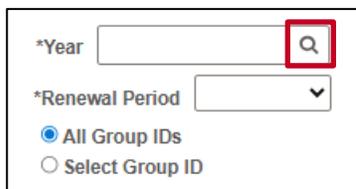
The **TLC Data Sheet Report** page displays.



The screenshot shows the 'TLC Data Sheet Report' interface. At the top, there is a header 'TLC Data Sheet Report'. Below it, the 'Run Control ID' is 'KZ_TLC_DATASH'. To the right, there are links for 'Report Manager' and 'Process Monitor', and a 'Run' button. The 'Run Control Parameters' section contains a search field for '*Year', a dropdown for '*Renewal Period', and radio buttons for 'All Group IDs' (selected) and 'Select Group ID'. At the bottom, there are buttons for 'Save', 'Notify', 'Add', and 'Update/Display'.

9. Click the **Year Look up** icon in the **Run Control Parameters** section.

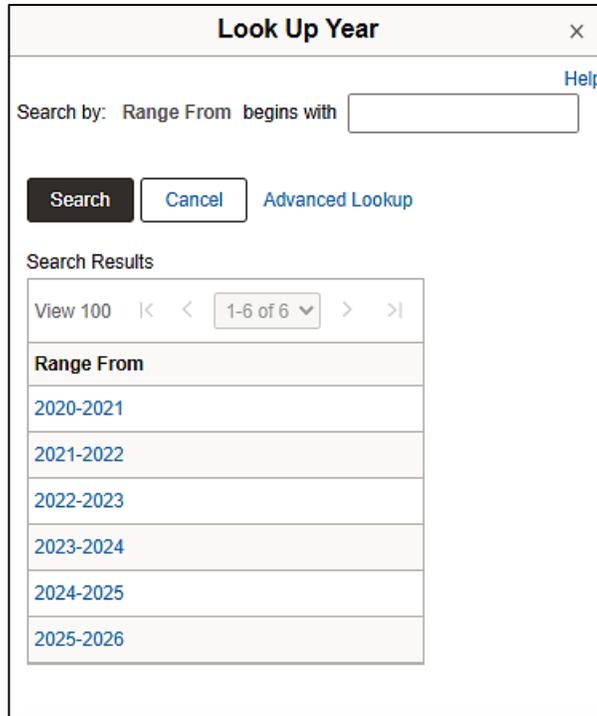
Note: This is a required field.



This is a close-up of the '*Year' search field from the 'Run Control Parameters' section. The search icon (magnifying glass) is highlighted with a red square, indicating it is the target for the next step.

Step	Action
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The **Look Up Year** page displays in a pop-up window.



Look Up Year ×

Search by: Range From begins with

Search **Cancel** [Advanced Lookup](#) [Help](#)

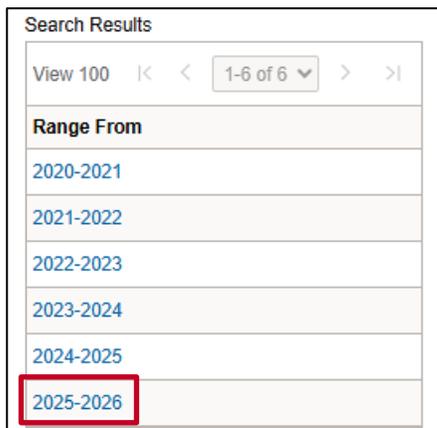
Search Results

View 100 < << 1-6 of 6 >> >

Range From
2020-2021
2021-2022
2022-2023
2023-2024
2024-2025
2025-2026

10

Click the applicable year range link in the **Range From** field.



Search Results

View 100 < << 1-6 of 6 >> >

Range From
2020-2021
2021-2022
2022-2023
2023-2024
2024-2025
2025-2026

Step	Action
	<p>The Run Control Parameters section redisplay.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px auto; width: fit-content;"> <p style="margin: 0;">Run Control Parameters</p> <p>*Year <input style="width: 100px;" type="text" value="2025-2026"/> <input type="button" value="Q"/></p> <p>*Renewal Period <input type="button" value="v"/></p> <p><input checked="" type="radio"/> All Group IDs</p> <p><input type="radio"/> Select Group ID</p> </div>
11.	<p>Click the Renewal Period dropdown button.</p> <p>Note: This is a required field.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px auto; width: fit-content;"> <p style="margin: 0;">Run Control Parameters</p> <p>*Year <input style="width: 100px;" type="text" value="2025-2026"/> <input type="button" value="Q"/></p> <p>*Renewal Period <input style="border: 2px solid red;" type="button" value="v"/></p> <p><input checked="" type="radio"/> All Group IDs</p> <p><input type="radio"/> Select Group ID</p> </div>
	<p>The Renewal Period dropdown list displays.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px auto; width: fit-content;"> <p style="margin: 0;">Run Control Parameters</p> <p>*Year <input style="width: 100px;" type="text" value="2025-2026"/> <input type="button" value="Q"/></p> <p>*Renewal Period <input style="border: 1px solid red;" type="button" value="v"/> <div style="border: 1px solid black; padding: 2px; margin-top: 2px; width: 100px;"> <p style="margin: 0; background-color: #0056b3; color: white;">All</p> <p style="margin: 0;">July</p> <p style="margin: 0;">October</p> </div> </p> <p><input checked="" type="radio"/> All Group IDs</p> <p><input type="radio"/> Select Group ID</p> </div>
12.	<p>Select the applicable Renewal Period for the report.</p> <p>Note: If you are unsure when your renewal occurs, contact tlc@dhrm.virginia.gov</p> <div style="border: 1px solid black; padding: 5px; margin: 10px auto; width: fit-content;"> <p style="margin: 0;">Run Control Parameters</p> <p>*Year <input style="width: 100px;" type="text" value="2025-2026"/> <input type="button" value="Q"/></p> <p>*Renewal Period <input style="border: 1px solid red;" type="button" value="v"/> <div style="border: 1px solid black; padding: 2px; margin-top: 2px; width: 100px;"> <p style="margin: 0; background-color: #0056b3; color: white;">All</p> <p style="margin: 0; border: 2px solid red;">July</p> <p style="margin: 0;">October</p> </div> </p> <p><input checked="" type="radio"/> All Group IDs</p> <p><input type="radio"/> Select Group ID</p> </div>

Step	Action								
	<p>The Run Control Parameters section redisplay.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> <p style="text-align: center;">Run Control Parameters</p> <p>*Year <input type="text" value="2025-2026"/> <input type="button" value="Q"/></p> <p>*Renewal Period <input type="text" value="July"/> <input type="button" value="v"/></p> </div>								
13.	<p>Select either the All Group IDs or the Select Group ID radio button. For the example below, the Select Group ID radio button has been selected.</p> <p>Note: The All Group IDs radio button is selected by default. To run the report for a specific Group ID or IDs, the Select Group ID radio button must be selected.</p> <ul style="list-style-type: none"> • All Group IDs radio button – Allows users to run the report for all their TLC groups (both main groups and any subgroups) • Select Group ID radio button – Allows users to select one or more specific Group IDs to view in the report <div style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> <p style="text-align: center;">Run Control Parameters</p> <p>*Year <input type="text" value="2025-2026"/> <input type="button" value="Q"/></p> <p>*Renewal Period <input type="text" value="July"/> <input type="button" value="v"/></p> <p><input type="radio"/> All Group IDs</p> <p><input checked="" type="radio"/> Select Group ID</p> </div>								
14.	<p>Click the TLC Group Look up icon.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> <p><input type="radio"/> All Group IDs</p> <p><input checked="" type="radio"/> Select Group ID</p> <p>Select Group ID</p> <div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;"> <input type="button" value="Q"/> <input type="button" value="Q"/> < < 1-1 of 1 > > </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 5%;"></th> <th style="width: 60%;">TLC Group</th> <th style="width: 10%;"></th> <th style="width: 10%;"></th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">1</td> <td style="text-align: center;"><input type="text" value=""/> <input checked="" type="button" value="Q"/></td> <td style="text-align: center;"><input type="button" value="+"/></td> <td style="text-align: center;"><input type="button" value="-"/></td> </tr> </tbody> </table> </div>		TLC Group			1	<input type="text" value=""/> <input checked="" type="button" value="Q"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
	TLC Group								
1	<input type="text" value=""/> <input checked="" type="button" value="Q"/>	<input type="button" value="+"/>	<input type="button" value="-"/>						

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

×

Search by: TLC Group ▼ begins with
Help

Search
Cancel
Advanced Lookup

Search Results

Only the first 300 results of a possible 398 can be displayed.

View 100
|<
<
1-300 of 300
>
>|

TLC Group	Business Unit
047001000	LOCAL
047002000	LOCAL
047004000	LOCAL
047005000	LOCAL
047006000	LOCAL
047007000	LOCAL
047009000	LOCAL
047010000	LOCAL
047013000	LOCAL
047015000	LOCAL

15.	<p>Click the applicable TLC Group ID link in the TLC Group section.</p> <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <div style="text-align: right; border-bottom: 1px solid black; margin-bottom: 5px;"> View 100 < < 1-300 of 300 > > </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">TLC Group</th> <th style="text-align: left;">Business Unit</th> </tr> </thead> <tbody> <tr><td>047001000</td><td>LOCAL</td></tr> <tr><td style="border: 2px solid red;">047002000</td><td>LOCAL</td></tr> <tr><td>047004000</td><td>LOCAL</td></tr> <tr><td>047005000</td><td>LOCAL</td></tr> </tbody> </table> </div>	TLC Group	Business Unit	047001000	LOCAL	047002000	LOCAL	047004000	LOCAL	047005000	LOCAL
TLC Group	Business Unit										
047001000	LOCAL										
047002000	LOCAL										
047004000	LOCAL										
047005000	LOCAL										

	<p>If you do not know your Group ID, see the Job Aid titled TLC Cardinal Locality - Company and Department Codes. This Job Aid is located on the Cardinal website in Job Aids under Learning.</p>
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Step	Action
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The **Run Control Parameters** page redisplay with the TLC Group ID displayed in the **Select Group ID** section.

Run Control Parameters

*Year

*Renewal Period

All Group IDs
 Select Group ID

Select Group ID

< < 1-1 of 1 > >

TLC Group			
1	<input type="text" value="047002000"/> <input type="button" value="Q"/>	<input type="button" value="+"/>	<input type="button" value="-"/>



Additional TLC Group IDs can be added by clicking the **Add a New Row** button, and repeating **Steps 14 – 15**.

Select Group ID

< < 1-1 of 1 > >

TLC Group			
1	<input type="text" value="047002000"/> <input type="button" value="Q"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Select Group ID

< < 1-2 of 2 > >

TLC Group			
1	<input type="text" value="047002000"/> <input type="button" value="Q"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
2	<input type="text" value="047004000"/> <input type="button" value="Q"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

16. Click the **Run** button on the top right side of the **TLC Data Sheet Report** page.

Report Manager Process Monitor

Step	Action
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The **Process Scheduler Request** page displays.

Process Scheduler Request x

[Help](#)

User ID Run Control ID

Server Name Run Date

Recurrence Run Time

Time Zone

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	TLC Data Sheet Report	V_BN366_RPT	Application Engine	Web	TXT	Distribution

17. Click the **OK** button.

OK

Cancel

The **TLC Data Sheet Report** page redisplay with a **Process Instance** number displayed.

TLC Data Sheet Report

Run Control ID
[Report Manager](#) [Process Monitor](#)

Process Instance:4338412

Run Control Parameters

*Year

*Renewal Period

All Group IDs
 Select Group ID

Select Group ID

TLC Group			
1	<input style="border: 1px solid #ccc;" type="text" value="047002000"/>	+	-

Step	Action
18.	Click the Process Monitor link. <div style="border: 1px solid black; padding: 5px; margin-top: 10px; text-align: center;"> Process Monitor </div>

The **Process List** page displays.

Process List Server List

View Process Requests

User ID Type Last Days Refresh

Server Name Instance Range Clear

Run Status Distribution Status Save On Refresh Report Manager Reset

Process List

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	4338412		KZ_TLC_DATASH	Application Engine	V_BN366_RPT	V_TRN_BN36101	12/23/2025 9:55:24AM EST	Success	Posted	Details	Actions
<input type="checkbox"/>	4338411		KZ_TLC_DataSheet	Application Engine	V_BN366_RPT	V_TRN_BN36101	12/23/2025 8:55:15AM EST	Success	Posted	Details	Actions

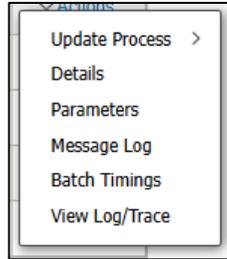
19.	Review the following two fields and values to verify they display as noted below Run Status = "Success" Distributions Status = "Posted" <div style="border: 1px solid red; padding: 5px; margin-top: 10px; text-align: center;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;">Run Status</th> <th style="width: 50%;">Distribution Status</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">Success</td> <td style="text-align: center;">Posted</td> </tr> </tbody> </table> </div>	Run Status	Distribution Status	Success	Posted
Run Status	Distribution Status				
Success	Posted				

20.	If these fields display any other value, click the Refresh button until the values display as noted above. <div style="border: 1px solid red; padding: 10px; margin-top: 10px; text-align: center;"> Refresh </div>
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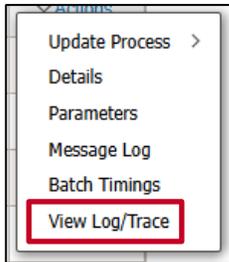
21.	Once the Run Status = "Success" and the Distribution Status = "Posted" , click the Actions link in the Action field. <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Actions+</p> <div style="border: 1px solid red; padding: 2px 5px; text-align: center;"> Actions </div> </div>
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Step	Action
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The **Actions** dropdown list displays.



22.	Click the View Log/Trace list item.
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The **View Log/Trace** page displays in a pop-up window.

View Log/Trace ×

[Help](#)

Report

Report ID	3405269	Process Instance	4338412	Message Log
Name	V_BN366_RPT	Process Type	Application Engine	
Run Status	Success			

TLC Data Sheet Report

Distribution Details

Distribution Node	htrn	Expiration Date	<input type="text" value="01/22/2026"/>
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File List

Name	File Size (bytes)	Datetime Created
AE_V_BN366_RPT_4338412.log	3,416	12/23/2025 9:56:40.517323AM EST
V_BN366_RPT.pdf	11,104	12/23/2025 9:56:40.517323AM EST

Distribute To

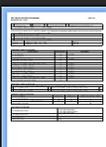
Distribution ID Type	Distribution ID
User	V_TRN_BN36101

Step	Action									
23.	<p>Click the PDF version of the report in the File List section in the Name field.</p> <div style="border: 1px solid black; padding: 5px;"> <p>File List</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="background-color: #f2f2f2;">Name</th> <th style="background-color: #f2f2f2;">File Size (bytes)</th> <th style="background-color: #f2f2f2;">Datetime Created</th> </tr> </thead> <tbody> <tr> <td>AE_V_BN366_RPT_4338412.log</td> <td style="text-align: center;">3,416</td> <td style="text-align: center;">12/23/2025 9:56:40.517323AM EST</td> </tr> <tr> <td style="border: 2px solid red;">V_BN366_RPT.pdf</td> <td style="text-align: center;">11,104</td> <td style="text-align: center;">12/23/2025 9:56:40.517323AM EST</td> </tr> </tbody> </table> </div>	Name	File Size (bytes)	Datetime Created	AE_V_BN366_RPT_4338412.log	3,416	12/23/2025 9:56:40.517323AM EST	V_BN366_RPT.pdf	11,104	12/23/2025 9:56:40.517323AM EST
Name	File Size (bytes)	Datetime Created								
AE_V_BN366_RPT_4338412.log	3,416	12/23/2025 9:56:40.517323AM EST								
V_BN366_RPT.pdf	11,104	12/23/2025 9:56:40.517323AM EST								

The TLC Data Sheet Report displays in a PDF format.

Note: This report may have multiple pages, as shown in this example.

V_BN366_RPT.pdf
1 / 4 | - 80% +
⌂ ↻ ↺ ↻
⌵ ⌴ ⋮

 1
 2
 3
 4

2025 - 2026 The Local Choice (TLC) Data Sheet
King William County - County

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
July Renewal: Begins: 7/1/2025 Ends: 6/30/2026			

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

Primary ID	047002001 King William County - DSS	546001378
Additional ID	047002000 King William County - County	546001376

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	Direct Billing
Medicare Retirees - eligible for Medicare	Yes	Direct Billing
Split Contract Dependents of Retirees	Yes	Direct Billing
Retiree Survivor - not eligible for Medicare	Yes	Direct Billing
Retiree Survivor - eligible for Medicare	Yes	Direct 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: 047002000	Enrolled Count	Waived Count	Eligible Count (Enrolled + Waived)
Full-time Employees	85	36	121
Total for this Group ID	85	36	121
Total Participation Percentage			70%

Plans: Applies to all Group IDs

Key Advantage Plan Choices	Key Adv 250 Comprehensive Dent Key Adv 250 Preventive Dent Key Adv 500 Comprehensive Dent
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The **TLC Data Sheet Report** can be downloaded and saved or printed as needed.

