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**.
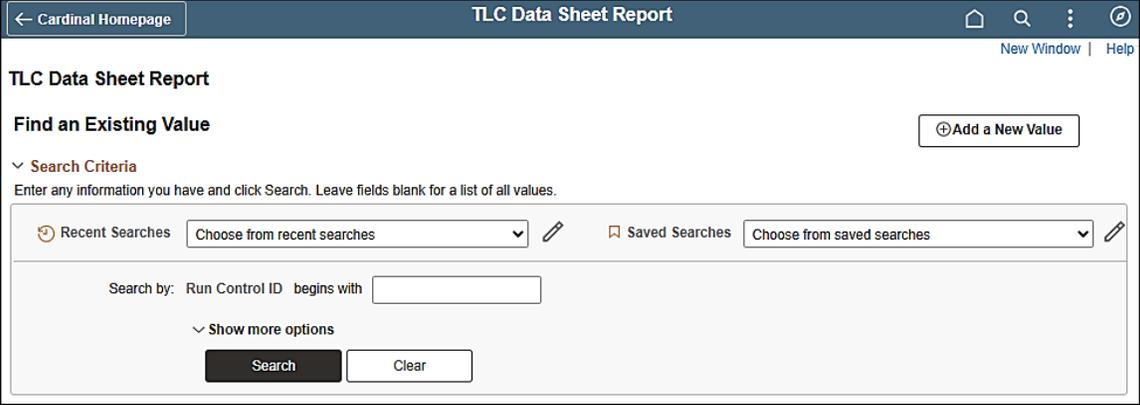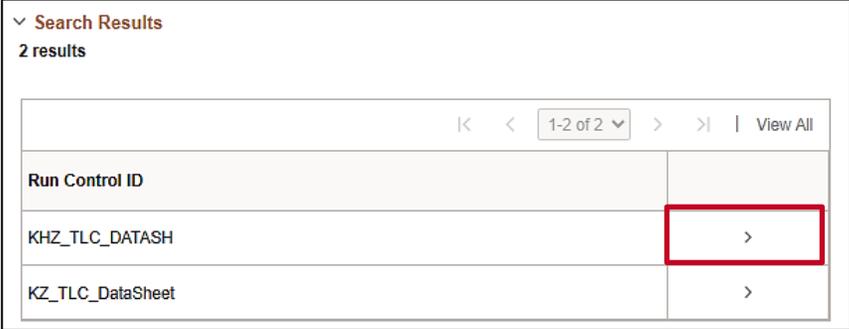
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Revision History

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

Running the TLC Data Sheet Report

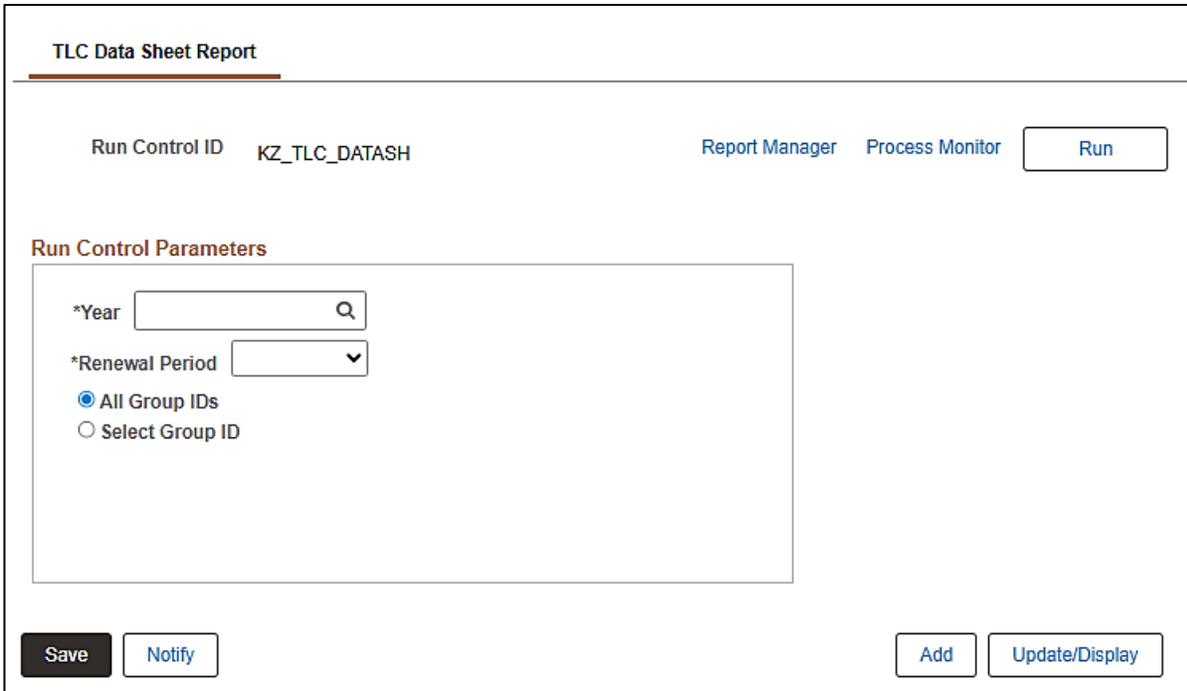| Step	Action
1.	Navigate to the TLC Data Sheet Report using the following path: **NavBar > Menu > Benefits > Employer Information > TLC Data Sheet Report**
	The **TLC Data Sheet Report Find an Existing Value** page displays.
1.	Click the **Search** button to see if a **Run Control ID** already exists for the report.
ℹ	A **Run Control ID** is required to run reports in Cardinal. 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. Users should always do a search before creating a new **Run Control ID**.
3.	If multiple results display, click **Drill in** icon on the desired **Run Control ID** row and proceed to **Step 9**.

Step	Action
4.	If only one Run Control ID exists, Cardinal will open the **Run Control** page for the report. Proceed to **Step 9**. **TLC Data Sheet Report** Run Control ID KHZ_TLC_DATASH Report Manager Process Monitor [Run] **Run Control Parameters** *Year [2025-2026 🔍] *Renewal Period [July ▾] ○ All Group IDs ● Select Group ID **Select Group ID** [⊞] [🔍] |< < 1-1 of 1 ▾ > >| **TLC Group** 1 [🔍] [+] [−] [Save] [Return to Search] [Notify] [Add] [Update/Display]
5.	If no Run Control ID exists, Cardinal will display "No matching values were found." Proceed to the next Step. ∨ **Search Results** No matching values were found.
6.	Click the **Add a New Value** button. [⊕ **Add a New Value**]

Step	Action
	The **TLC Data Sheet Report Add a New Value** page displays. ← Process List **TLC Data Sheet Report** New Window | Help **TLC Data Sheet Report** **Add a New Value** 🔍 Find an Existing Value Run Control ID [_____] Add
7.	Enter a Run Control ID for this report in the **Run Control ID** field. Run Control ID [_____] Add
ℹ️	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. Once a **Run Control ID** is created and saved it cannot be deleted.
8.	Click the **Add** button. **Note**: For this example, a Run Control ID of **KZ_TLC_DATASH** has been used. Run Control ID [KZ_TLC_DATASH] Add
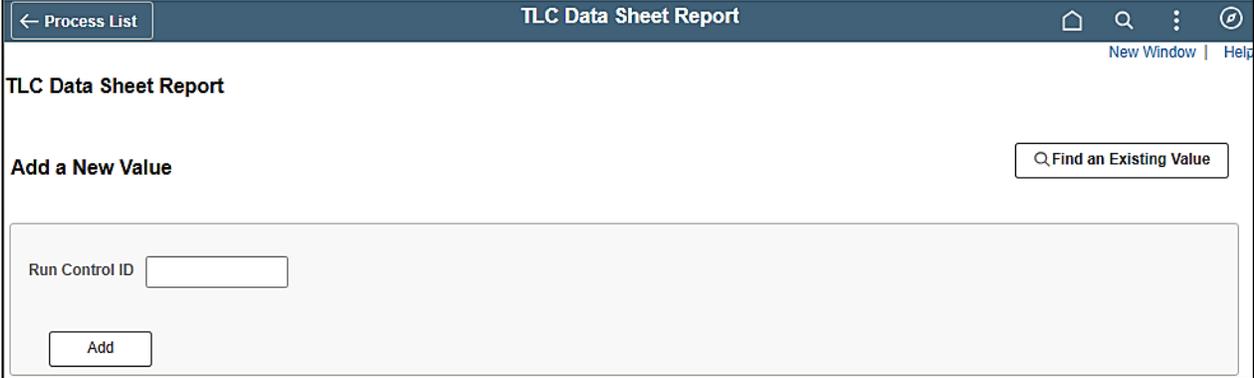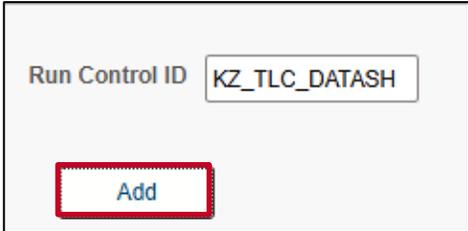
Step	Action
	The **TLC Data Sheet Report** page displays. **TLC Data Sheet Report** Run Control ID KZ_TLC_DATASH Report Manager Process Monitor [Run] **Run Control Parameters** *Year [🔍] *Renewal Period [▼] ⦿ All Group IDs ○ Select Group ID [Save] [Notify] [Add] [Update/Display]
9.	Click the **Year Look up** icon in the **Run Control Parameters** section. **Note**: This is a required field. *Year [🔍] *Renewal Period [▼] ⦿ All Group IDs ○ Select Group ID
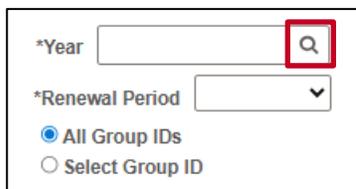
Step	Action
	The **Look Up Year** page displays in a pop-up window. **Look Up Year** ✕ Help Search by: Range From begins with [ ] [Search] [Cancel] Advanced Lookup **Search Results** View 100 |< < [1-6 of 6 ▾] > >| **Range From** 2020-2021 2021-2022 2022-2023 2023-2024 2024-2025 2025-2026
10	Click the 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**
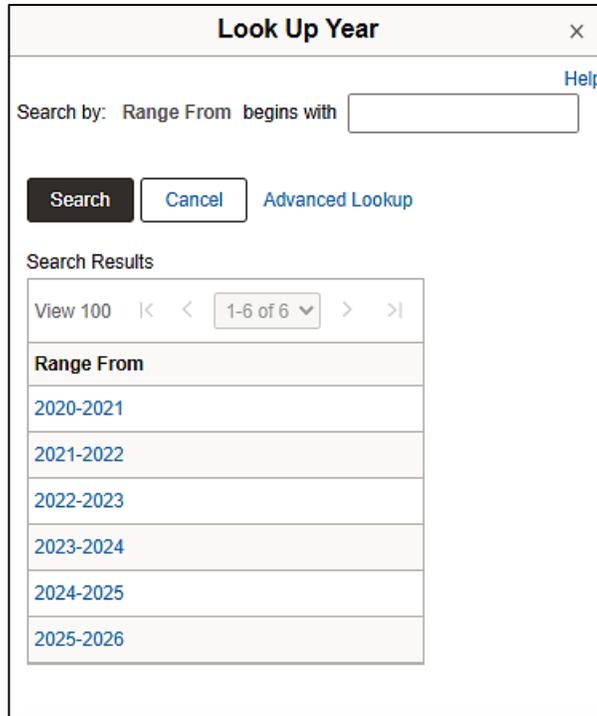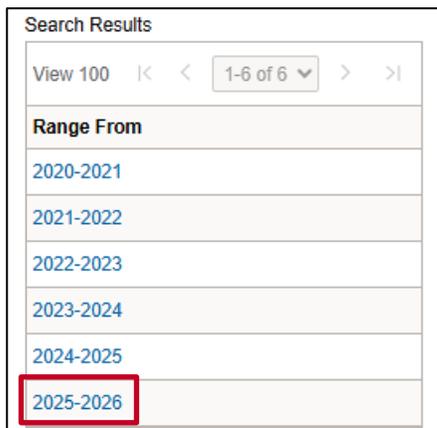
Step	Action
	The **Run Control Parameters** section redisplays.
11.	Click the **Renewal Period** dropdown button. **Note**: This is a required field.
	The **Renewal Period** dropdown list displays.
12.	Select the applicable **Renewal Period** for the report. **Note**: If you are unsure when your renewal occurs, contact tlc@dhrm.virginia.gov

Step	Action
	The **Run Control Parameters** section redisplays.
13.	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.
	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.
	• **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
14.	Click the **TLC Group Look up** icon.

Step	Action
	The **Look Up TLC Group** page displays in a pop-up window.
15.	Click the applicable **TLC Group ID** link in the **TLC Group** section.
ⓘ	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**.

Step	Action
	The **Run Control Parameters** page redisplays with the TLC Group ID displayed in the **Select Group ID** section. **Run Control Parameters** *Year 2025-2026 *Renewal Period July ○ All Group IDs ● Select Group ID **Select Group ID** 1-1 of 1 **TLC Group** 1 047002000
ℹ	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 047002000 + − **Select Group ID** 1-2 of 2 **TLC Group** 1 047002000 + − 2 047004000 + −
16.	Click the **Run** button on the top right side of the **TLC Data Sheet Report** page. Report Manager Process Monitor Run

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

Step	Action
17.	Click the **OK** button.

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

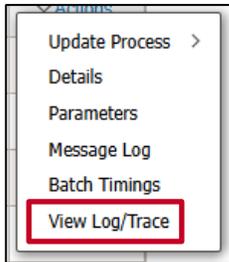| Step	Action
18.	Click the **Process Monitor** link. Report Manager Process Monitor Run
	The **Process List** page displays. Process List Server List View Process Requests User ID V_TRN_BN361 Type [ ] Last [ ] 1 Days [ ] Refresh Server [ ] Name [ ] Instance [ ] Range Clear Run Status [ ] Distribution Status [ ] ☑ Save On Refresh Report Manager Reset ▽ Process List 1-9 of 9 View All | Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
--------	----------	------	----------------	--------------	--------------	------	---------------	-----------	---------------------	---------	---------
☐	4338412		KZ_TLC_DATASH	Application Engine	V_BN366_RPT	V_TRN_BN36101	12/23/2025 9:55:24AM EST	Success	Posted	Details	⌄Actions
☐	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" 	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. **Refresh**
21.	Once the **Run Status** = "Success" and the **Distribution Status** = "Posted", click the **Actions** link in the **Action** field. Actions+ ⌄Actions

Step	Action
	The **Actions** dropdown list displays.
22.	Click the **View Log/Trace** list item.
	The **View Log/Trace** page displays in a pop-up window.
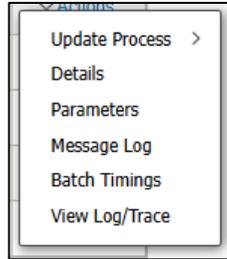
Step	Action
23.	Click the PDF version of the report in the **File List** section in the **Name** field.

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

The TLC Data Sheet Report displays in a PDF format.

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

The **TLC Data Sheet Report** can be downloaded and saved or printed as needed.